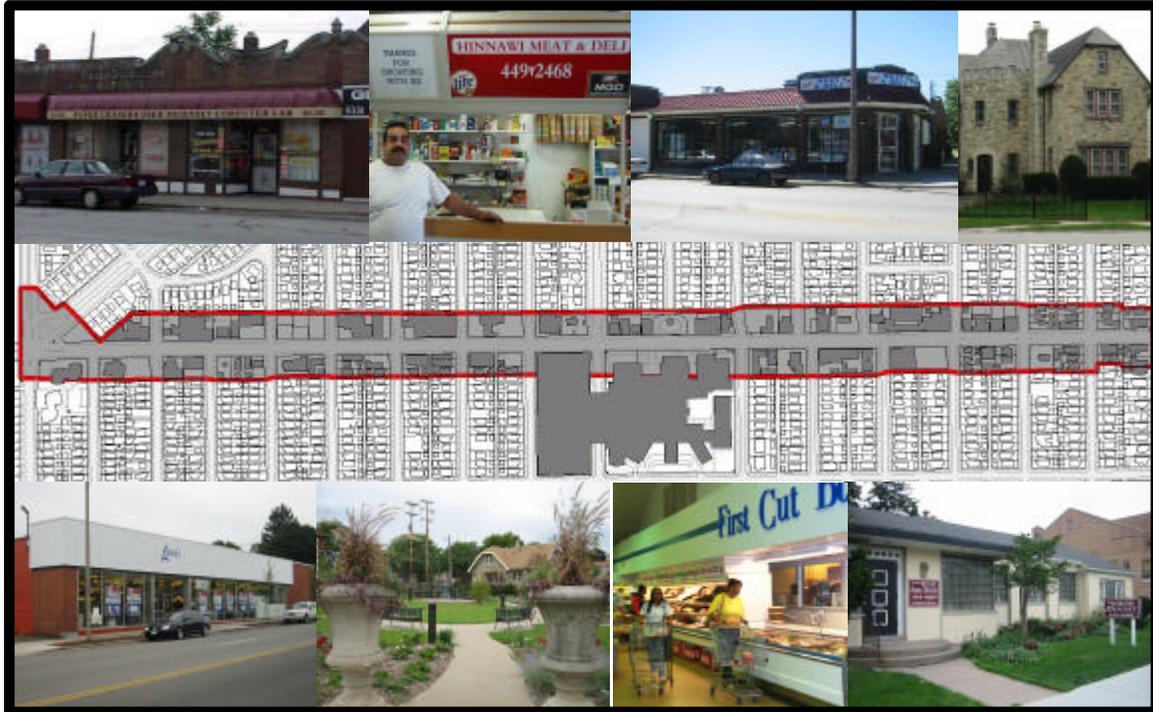


Burleigh Street (Sherman Boulevard to 60th Street) Commercial District Market Analysis and Consumer Survey



BURLEIGH STREET
Community Development Corporation

...with the assistance of:

Alderman Fred Gordon

Alderwoman Rosa Cameron

*City of Milwaukee
Department of Community Development*

October 2002

Introduction

The Burleigh Street Community Development Corporation in coordination with Alderman Fred Gordan, Alderwoman Rosa Cameron, and the Department of City Development have conducted a market analysis to better understand the Burleigh Street Commercial District from Sherman Boulevard to 60th Street (BSCD). (**See Appendix 1**). The result of this analysis will provide insight into customer demographics and the types of businesses that should be encouraged to locate within this area and better understand the commercial districts' strengths and weaknesses based on statistical data.

Specifically, market analysis seeks to answer questions about the relative supply and demand of retail goods within a local market area. At a basic level, market analysis can help an area to identify to what degree there are net outflows or inflows of retail consumption dollars. By comparing actual retail dollars spent to the potential retail dollars that could be spent in that area, this analysis can help identify potential opportunities and voids in local retail markets. If there is a surplus of dollars being spent in a local retail market, then this means that the area is actually selling more than what is predicted for the local population base – and therefore drawing people in from other commercial districts. Conversely, if fewer dollars are being spent locally than what the potential is, based on population and income levels, then the commercial district is experiencing a leakage of retail trade – i.e. people are traveling outside to purchase these retail goods.

In addition, a consumer survey is combined with the market analysis. The consumer survey has two parts that will provide further insight about BSCD consumers. In the first part respondents are asked their opinions about the business district's profile. They will indicate how frequently they shop within the commercial and identify areas that need to be improved. The second part of the consumer survey will collect demographic information from the respondents to gain a better understanding of the district customers. The consumer survey in conjunction with the market analysis will further pinpoint the types of retail stores that the study area desires. Also, it will provide more ammunition for attracting retailers to the area.

Section One: Market Analysis

Market Characteristics

The Burleigh Street Commercial District is a neighborhood shopping center. Neighborhood shopping centers provide goods and services that are at convenient locations for day-to-day needs and unique specialties needs. These stores are generally small, and uses such as specialty grocers, clothing stores, restaurants, and other small retailers predominate. In this respect Burleigh Street Commercial District differs from regional centers like Midtown Center. Regional centers serve wide areas and act as destinations for special, large, or one-time purchases. They are characterized by "big box" buildings. Such large-scale developments should seek the Midtown Center or the downtown as better locations.

Customers for the Burleigh Street Commercial District are located within one of the densest neighborhoods, have one of the highest incomes per square mile, and have one of the highest purchasing powers per square mile. According to the Persons Per Square Mile Map created by the City of Milwaukee Department of Community Development there is on average 12,000 people per square mile (**See Appendix 2**). Also, they have among the highest levels of purchasing powers despite lower household incomes. (**See Appendix 3**). Although the median household income in the BSCD area is \$22,789, total estimated income within the area is \$830,101,054. (**See Appendix 4**) A map created by the City of Milwaukee Department of Community Development concurs. It, also, shows that the income per square mile in comparison with Milwaukee County is higher in the BSCD as well. (**See Appendix 5**). In addition to aggregate income, purchasing power for this area is much higher than many areas. Total retail spending in

the area is \$36.0 million per square mile. This is in comparison with \$4.5 million per square mile for Franklin, \$5.4 million per square mile for Oak Creek, \$14.9 million per square mile for the "North Shore," \$20.4 million per square mile for Cudahy, and \$25.6 million per square mile for West Allis (**See Appendix 6**).

Traffic counts in the Burleigh Street Commercial District area are relatively high. Data provided by the City of Milwaukee Department of Public Works showed that 12,000 vehicles per day travel along Burleigh Street. About 16,000 vehicles per day travel along North 60th Street, 20,000 vehicles per day travel along Sherman Boulevard, 30,000 vehicles per travel along Capitol Drive, and 14,000 vehicles per day travel along West North Avenue. This is important because the potential demand is, at least in part, a function of traffic exposure. The most successful businesses require high visibility and accessibility. A large segment of this neighborhood is, also, dependent on public transportation. There are 96,912 licensed drivers in the area, but only 82,338 registered vehicles. This means there is a 1.2:1 ratio of licensed drivers to registered cars. (**See Appendix 6**). Those residents without cars along with passing vehicular traffic indicate potential demand. What this means, specifically, for the Burleigh Street Commercial District is that neighborhood residents are more dependent upon local businesses or using public transit to purchase necessary items. Retail businesses that service the local market in the Burleigh Street Commercial District will generate businesses from high traffic counts and the population that does not own vehicles.

Methodology

Defining the Trade Area

The Burleigh Street Commercial District trade area was created using ArcView GIS. ArcView GIS, a geographic information system, is software that allows a user to manipulate, analyze, and display spatial information. The software was used to create a one-mile travel distance area. Retail trade analysis based on travel distance is a common way to analyze the supply of retail and the demand of customers. This market analysis assumes that customers will not travel longer than one-mile distance to visit a neighborhood shopping district for retail goods. The trade areas boundaries are North 76th Street, West Capitol Drive, West North Avenue, and North 27th Street. **Appendix 1** contains a map of the commercial district and the one-square-mile trade area.

Inventory of Retail Businesses

The BSCD study area was determined by the City of Milwaukee Department Community Development Milwaukee's Mainstreets and the BusinessUSA dataset. The Commercial District Inventory was compiled to market properties within the Mainstreets Commercial District. In this database tenant names and physical features of the properties are available. Names of tenants were re-verified by a windshield survey, a drive-by of the commercial district. BusinessUSA is a dataset that is provided by InfoUSA, a business that compiles yearly lists of companies from phone book entries, legal filings, changes of address, and business publications. They are confirmed by phone calls to the businesses. This list was last updated in November of 2001. Using these three sources 220 retailers were found within the one-mile trade area.

Sources for Retail Demand and Supply

The market was analyzed using a variety of secondary data sources to find out if the supply of retail stores within each trade area is meeting consumers' demand for goods and services. The retail sales were found using data from the U.S. Census Bureau's *1997 Economic Census of Retail Trade*. This is the most current publication illustrating total sales and the number of stores in the Milwaukee-Waukesha area. The demand for goods and services within the trade area was determined using *1999-2000 The Consumer Expenditure Survey* from the Bureau of Labor Statistics and income data from Claritas 1996 estimates. The number of local stores was obtained from the DCD Commercial District Inventory and BusinessUSA datasets that were described in the last section. Both income and sales data were adjusted to reflect 2002 dollars using the *Consumer Price Index*.

Defining Market Categories

Apparel and Services

This category is made up of stores related to clothing, clothing services, and accessories. In this category are men's clothing stores; women's clothing stores; infant and children's clothing stores; shoes stores; jewelry stores; dry-cleaning and laundry services; and sewing, needle, and piece goods stores. *The Economic Census of Retail Trade* tracks the total sales for each retail type and lists the amounts spent at each. However, *The Consumer Expenditure Report*, although, reports the average amount spent on clothing items, it lumps stores and services like jewelry stores; dry-cleaning and laundry services; and sewing, needle, and piece goods stores into a category titled "Other Apparel and Services." It is important to remember that for this category the approximate number stores needed for the BSCD has the potential for being over-stated as the same estimate of spending "Other Apparel and Services" was combined in *The Consumer Expenditure Report*.

1. Men's Clothing Stores includes all stores that sell clothing and accessories for men.
2. Women's Clothing Stores includes all retailers that sell clothing and accessories for women.
3. Infant and Children's Clothing Stores include all stores that sell clothing boys, girls, and infants.
4. Jewelry Stores account of new jewelry; new sterling and plated silverware; and new watches and clocks.
5. Shoe stores include retailers that sell shoes, slippers, boots, and similar items. It excludes footwear for children under 2 and special footwear for sports.
 - Men's Clothing Stores account for 21.1% of all money spent on "Apparel and Services."
 - Women's Clothing Stores account for 31.1% of all money spent on "Apparel and Services."
 - Infant and Children's Clothing Stores account for 17.3% of all money spent on "Apparel and Services."
 - Shoe Stores account for 16.8% of all money spent on "Apparel and Services."
 - Dry-cleaning and laundry services; jewelry stores; sewing, needle, and piece good stores account for 16.8% of all money spent on "Apparel and Services."

Entertainment

In this category, are retail stores specializing in recreation and hobbies. Stores in this category include appliances, television and electronics stores; book stores; computer and software stores; florists; gift stores; hobby, game, and toy stores; tape, CD, and record stores; and video tape rental stores. Fortunately, *The Economic Census of Retail Trade* tracks the total sales for each retail type and lists the amounts spent at each. However, *The Consumer Expenditure Report*, reports six corresponding categories: "Reading," "Other Household Expenses," "Fees and Admissions," "Television, Radio, and Sound Equipment," "Pets, Toys, Hobbies, and Playground Equipment," and "Other Entertainment Equipment and Services." Appliances, Televisions, and Other Electronics Stores are placed into "Television, Radio, and Sound Equipment" spending category. Book Stores are located in the "Reading" spending category. Florists and Computer and Software Stores have been put into the "Other Household Expenses" spending category by *The Consumer Expenditure Survey*. Gift Stores and Hobby, Game, and Toy Stores are placed into the "Pets, Toys, Hobbies, and Playground Equipment" spending category. Video Tape Rental Stores have been put into the "Admissions and Fees" spending category.

1. Appliance, Television, and other Electronics Stores comprises of stores retailing new household appliances, consumer electronic products, single line of new consumer electronic products; and repair services.
2. Bookstores sell specialty books, periodicals, newspapers, and new books.

3. Computer and Software Stores retail new computers, computer peripherals, and pre-packaged computer software, and repair and support services.
4. Florists sell floral arrangements, cards, and individual flowers.
5. Gift, Hobby, Game, and Toy Stores specialize in gifts, novelty merchandise, greeting cards, seasonal decorations, new toys, games, and hobby and craft supplies
6. Videotape Rental Stores rent DVDs, videocassette tapes, and video games.

Food at Home

For this category it was necessary to make a distinction between supermarkets, specialty grocers, and corner/convenience grocers. Supermarkets have a higher per store output, and aggregating the categories diminishes the potential market for smaller grocers. Fortunately, *The Economic Census of Retail Trade* tracks the total sales for Food and Beverage Stores and lists the amount taken in by supermarkets, specialty grocers, and corner/convenience grocers. From this the percentage of money spent on "Food at Home" was determined for each subcategory.

1. The Supermarkets category includes all full-service grocery stores, excluding ethnic grocery stores, with outputs greater than \$1 million per year.
2. The Specialty Grocery subcategory includes all ethnic grocer markets, meat market and butchers, fish markets, produce market, and gourmet food markets.
3. The Convenience Grocery subcategory includes corner grocery markets, limited service grocery markets, and other convenience grocery markets, which are not classified as gas stations.
 - Supermarkets account for 95.4% of all money spent on "Food at Home."
 - Specialty/Ethnic Grocer accounts for 2.3% of all money spent on "Food at Home."
 - Corner/Convenience Grocers account for 2.3% of all money spent on "Food at Home."

Food Away from Home

A methodology similar to the one above was used to divide "Food Away from Home" into subcategories. This is necessary because more as more Limited Service Restaurant exist in the one square mile trade are than do Full Service Restaurants. If combined, the analysis would indicate that there are too many restaurants overall when, in fact, a large market exists for Full Service Restaurants.

1. The Full Service Restaurant category includes all sit-down restaurants with wait service and dinner hours.
2. The Limited Service Restaurant category includes fast-food restaurants, take-out restaurants, bakeries, coffeehouses, delicatessens, and limited-service cafes.
 - Full Service Restaurants account for 48.5% of all money spent on "Food Away from Home."
 - Limited-Service Restaurants account for 51.5% of all money spent on "Food Away from Home."

Health Care and Personal Care Items

Due to mismatches in category definitions, manipulations were required to calculate the supply and demand for "Health and Personal Care Item" stores. The *Economic Census of Retail Trade* includes pharmacies, cosmetics stores, beauty supply and perfume stores, optical goods stores, and food supplement stores in the same category, "Health and Personal Care Items." In contrast, the *Consumer Expenditure Survey* divides products between two separate categories, "Health Care" and "Personal Care Products." To eliminate a data discrepancy, the two *Consumer Expenditure Survey* categories were combined.

Another data manipulation was required because the Consumer Expenditure Survey includes health insurance premiums under the "Health Care" category and the Economic Census of Retail

Trade excludes if from the “Health and Personal Care” category. As a result it was necessary to determine the amount of the “Health Care” not spent on health insurance. According to the Consumer Expenditure Survey, the Midwest spends 48.2% of the “Health Care” category on health insurance, which leaves 52.2% of the category spent on other health care items. To find the total expenditures available for the two categories, “Health Care” and “Personal Care Products,” without health insurance, the following calculation was used:

\$2,283	+	\$1,101	-	\$562	=	\$1,744
Amount Spent on Health Insurance		Personal Care Expenditures		Health and Personal Care Items		

The amount, \$2,283, represents the total amount spent on “Health Care” expenditures, the \$1,101 is the amount spent on health insurance premiums, and \$562 represents spending on “Personal Care” products. The end result is the category called “Health and Personal Care Items.” A methodology similar to the one used for previous categories was applied to this category to estimate expenditures for “Health Care and Personal Care Products.” These include Pharmacies and Drugstores; Cosmetics, Beauty Supplies and Perfume Stores; Food Supplement Stores; and Hair, Nail, and Skin Services.

1. The Pharmacies and Drugstores subcategory includes all stores where selling prescription and non-prescription drugs is the major proportion of their business. This would not include stores such as “Target” that have pharmacies.
2. The Cosmetics, Beauty Supplies, and Perfume subcategory includes wig stores, “Bath and Bodyworks” type shops, cosmetic stores, hair products stores, and perfume stores.
3. The Food Supplement Stores subcategory includes all food supplement and vitamin stores such as “GNC.”
4. The Hair, Nail, and Skin Services subcategory includes all barbers, beauty salons, manicurists, and spa stores.
 - Pharmacies and Drug Stores account for 77.2% of all money spent on “Heath and Personal Care Products and Services.”
 - Cosmetics, Beauty Supplies, and Perfume Stores account for 2.4% of all money spent on “Heath and Personal Care Products and Services.”
 - Food Supplement Stores account for 2.4% of all money spent on “Heath and Personal Care Products and Services.”
 - Hair, Nail, and Skin Services account for 12.6% of all money spent on “Heath and Personal Care Products and Services.”

Household Furnishing and Equipment

This category retails new furniture and home furnishings merchandise from fixed point-of-sale locations. *The Census of Retail Trade* tracks sales for this category and *The Consumer Expenditure Survey* places it under the category of “Household Furnishings and Equipment. According to the Midwest *Consumer Expenditure Survey* people spends 22.75% on furniture. Health Care Expenditures

Market Analysis Results

This type of analysis serves as a *starting point* for finding openings in the market. However, market analyses are limited in that the unique purchasing characteristics of a neighborhood can alter results. Other external factors which can affect the market analysis include: decline and improvement in urban commercial districts, subtle differences in the real and/or perceived convenience of other commercial districts, and the manner in which purchases are made as a part of a customers’ daily routine.

Particularly significant for the BSCD trade area is Midtown Center located at Capitol Avenue and 60th Street, just outside the trade area boundaries. Midtown Center is the demolition of the former Capitol Court shopping mall that will be replaced with other retail developments. The redevelopment of Midtown Center will create approximately 600,000 square feet of retail space. Midtown will be strong competition in the attraction of business because of better access and larger parcels that are available for development. This will affect the "community" shopping centers more so than the neighborhood shopping centers like BSCD. Wal-Mart, Pick 'n Save, Payless Shoe Store, Best Price Fashions, Footlocker, and Kids Footlocker that will take occupancy in the Midtown Center have been included in the Burleigh Street Commercial District Market Analysis to provide a more accurate portrayal of retail business and service needs. At the time this market analysis was completed occupancy of the Midtown Center had remained at 80% at the of this analysis. Smaller markets may exist in the future market analysis that are performed, yet the differences may be imperceptible.

After analyzing the results of the BSCD Gap in Retail Trade (see Appendix 2), a number of development opportunities become apparent. The column in the appendix called "The Number of Additional Stores to Reach Capacity" demonstrates the potential or limited market for each product. A positive number indicates that a demand for additional stores exist within the trade area. A negative number indicates that the market is already saturated and development should not be targeted. The following is a summary of all retail categories in the market analysis. (**See Appendix 7**).

Apparel and Services

- *Men's Clothing Stores*: There is a positive gap in the market for this type of retailer, meaning demand is greater than supply. Approximately, 4.58 stores could be supported in the trade area.
- *Women's Clothing Stores*: Analysis for this type of store indicates there is room for additional stores (6.47) in the trade area.
- *Children's and Infant Clothing Stores*: The BSCD market analysis indicates an opening for 5.53 additional stores.
- *Jewelry Stores*: The analysis suggests there is a larger demand than supply for jewelry stores (-2.88). This analysis does not propose there are 2 stores that are not being supported by the BSCD trade area. It says merely that additional businesses of this type should not be pursued or encouraged.
- *Shoe Stores*: There is a modest opening for shoe stores in the BSCD trade area (1.62).
- *Dry-cleaning and Laundry Services*: The market analysis indicates substantial openings for additional dry-cleaning and laundry services (10.49).
- *Sewing, Needle, and Piece Good Stores*: Supply for sewing, needle, and piece good stores has yet to met demand within the BSCD trade area. An additional 6.54 stores could be accommodated.

Entertainment

- *Appliance, Television, and Other Electronic Stores*: The BSCD trade area market analysis shows an overstatement of this type of retailer (-4.93). Again, this analysis does not propose there are 5 stores that are not being supported by the BSCD trade area. It says merely that additional businesses of this type should not be pursued or encouraged.
- *Book Stores*: There is a very small opening for bookstores in this area (0.57). However, the bookstores in this area are primarily specialty books stores such as comic and antique books. There may be an opening for a new general book retailer within the BSCD trade area.
- *Computer and Software Stores*: Within this category of retailer there is an opening (3.47).
- *Florists*: The market analysis suggests a tremendous opening for florists with the Burleigh Street Commercial District trade area (43.27).

- *Gift Stores*: There is a considerable opening for gift stores in the Burleigh Street Commercial District Trade Area (10.53).
- *Hobby, Game, and Toy Stores*: For this retail sector there is a modest opening for additional stores (3.41).
- *Tape, CD, and Record Stores*: This is another sector where there is a moderate opening for additional stores (4.61).
- *Videotape Rental Stores*: There is great potential for additional videotape rental stores in the Burleigh Street Commercial District Trade Area. The analysis indicates that 18.60 additional stores have the promise of being supported.

Food At Home

- *Supermarkets*: The analysis for this category finds that there is a small market opening (2.64).
- *Specialty Grocery Stores*: The analysis suggests that the supply for this type of retail is greater than area demand (-23.42). However, it is difficult to compare ethnic or other specialty grocery stores because they sell specialized items. Each type of grocery store fills a small niche and a kosher meat butcher may not be in competition with a bakery. As a result it is possible that additional specialty grocers may find a customer base within the BSCD trade area.
- *Convenience Grocery*: The urban market is home to a large number of small, corner grocery stores. The analysis shows that this is the same for the BSCD trade area (-6.36). Gas stations and pharmacies that provide convenience type groceries were excluded from this category because they are most appropriately placed in other categories.

Food Away From Home

- *Full Service Restaurants*: The BSCD analysis indicates that there is an opening for full service restaurants (2.64).
- *Limited Service Restaurants*: Analysis indicates a greater supply than demand for this type of restaurant (-20.42). Again, this analysis does not propose there are 20 stores that are not being supported by the BSCD trade area. It says merely that additional businesses of this type should not be pursued or encouraged.

Health Care and Personal Items

- *Pharmacies and Drug Stores*: The analysis for this subcategory finds that there is a small market opening (0.37).
- *Cosmetics, Beauty Supplies, and Perfume Stores*: There is an over statement of 4.79 cosmetics, beauty supply, and perfume stores within the BSCD trade area. Again, this analysis does not propose there are 5 stores that are not being supported by the BSCD trade area. It says merely that additional businesses of this type should not be pursued or encouraged.
- *Health Food Supplement Stores*: Supply is greater than demand in the BSCD for this type of retailer. There is an over statement of 3.73 stores. As previously stated, this analysis does not propose there are 5 stores that are not being supported by the BSCD trade area. It says merely that additional businesses of this type should not be pursued or encouraged.
- *Hair, Nail, and Skin Services*: Analysis indicates there is a greater supply than demand in the BSCD trade area by 39.39 stores. This does not say that there are 39 stores that are not being supported, it merely says that additional businesses of this type should not be pursued or encouraged.

Home Furnishing and Equipment

- *Furniture Stores*: The BSCD trade area market analysis indicates that there is more supply than demand in the area for furniture stores (-3.18). To reiterate, this does not say that there are 3 stores that are not being supported, it merely says that additional furniture stores should not be pursued or encouraged.

Market Analysis Conclusions

By comparing actual retail dollars spent to the potential retail dollars that could be spent in that area, this analysis can help identify potential opportunities and voids in local retail markets. The market analysis indicates that an opportunity exists for new development in the Burleigh Street Commercial District trade area. Particular attention should be paid to the following sectors: florists; video tape rental stores; full-service restaurants; gift stores; dry-cleaning and laundry services; men's clothing stores; women's clothing stores; infant and children's clothing stores; and needle, sewing, and piece goods stores. Additionally, a market exists for computer and software stores; tape, CD, and record stores; hobby, game, and toy stores; pharmacies; supermarkets; shoe stores; and bookstores. Jewelry stores; health food supplement stores; cosmetics, beauty supply and perfume stores; appliances, televisions, and other electronics stores; convenience stores; limited service restaurants; specialty food stores; and hair, skin, and nails services should not be recruited for location in the Burleigh Street Commercial District. (**See Appendix 6**).

But as stated in a previous section, market analyses are only a *starting point* for openings in the market. Market analyses can not pick up on unique purchasing characteristics of a neighborhood and external factors such as decline and improvement in other commercial districts and perceptions of the commercial districts that can alter results. Improvements in the Midtown Center businesses have been included in the market analysis to capture some of this, but caution should still be used in the interpretation of this document.

Furthermore, the data used for this study is taken from the Consumer Expenditure Survey, which looks at household spending patterns for the Metropolitan Area. It is possible that the spending habits of the households in the study area differ from the metropolitan area as a whole. Changes in Consumer Expenditure numbers to more accurately portray the neighborhood could also alter the results of the market analysis. For example, a study by Pricewaterhouse Coopers on the tendencies of inner-city shoppers suggests that inner-city shoppers spend more on apparel than the average U.S. household.

Section Two of this report is a consumer survey. This combined with the market analysis will provide further insight about BSCD consumers. It will yield information about the perceptions of the commercial district, how often customers shop BSCD, and more detailed demographic information about customers in the area. The consumer survey in conjunction with the market analysis will further pinpoint the types of retail stores that the study area desires. Also, it will provide additional ammunition for attracting retailers to the area.

Section Two: Consumer Survey

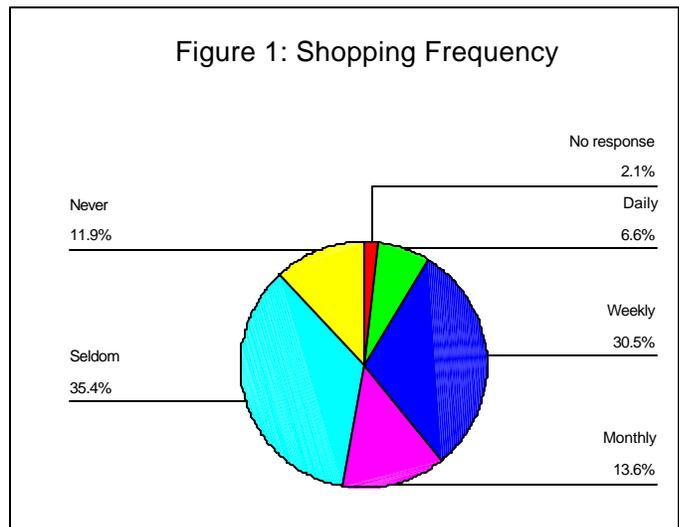
Methodology

Approximately 3,000 mail surveys were mailed out to people in the Burleigh Street Commercial District Neighborhood. By the due date 243 surveys, or an 8 percent response rate, were completed and returned to the Department of Community Development. The surveys were assigned a three digit unique identifier, cover pages containing confidential contact information were removed and safely disposed, and the results were coded into a spreadsheet. Analysis was completed to find the mean, frequency, or and percentages of responses. Survey results are divided into two profiles: Business District and Consumer Profile.

Business District Profile

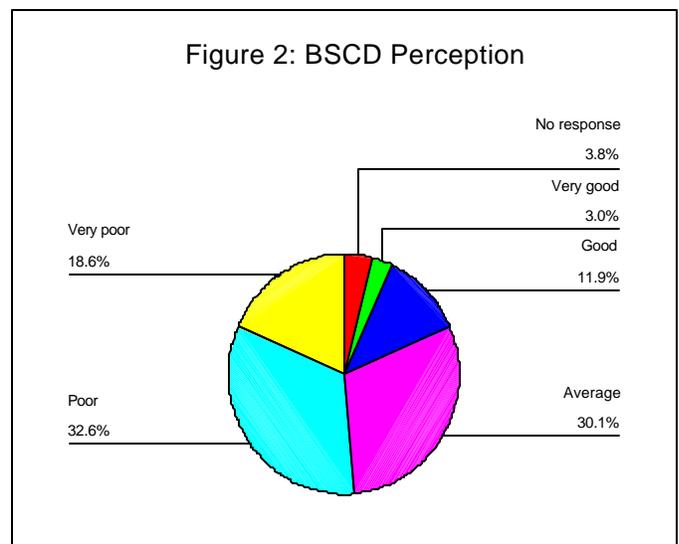
1. *How frequently do you shop at the businesses located within the Burleigh Street commercial district?
Daily/Weekly/Monthly/Seldom/Never*

This question asked respondents how often they shopped the Burleigh Street Commercial District. Figure 1 shows the results. A majority, 51% of people shop the commercial district regularly. Meaning, 7% shop the district daily, 31% shop the district on a weekly basis, and 14% shop on a monthly basis. Of those who do not shop the commercial district regularly 35% said they seldom shopped the district and 12% said they never shop the commercial district.

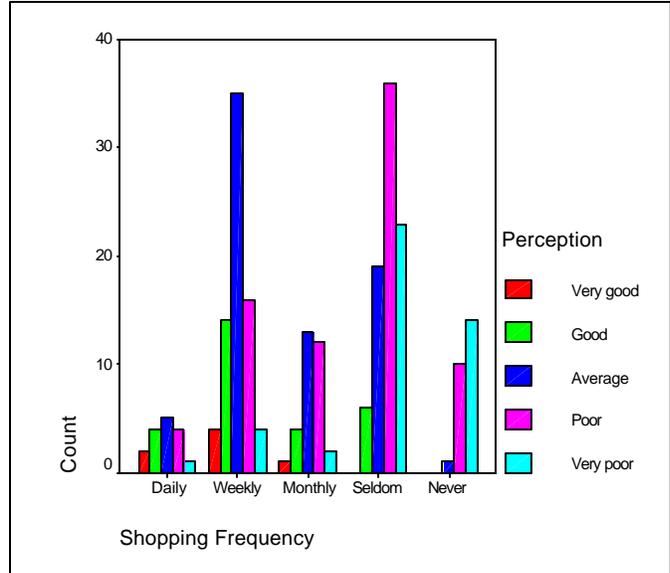


2. *Overall, I would rate shopping within the Burleigh Street commercial district as:
Very Good/Good/Average/Poor/Very Poor*

Question two tries to determine how people perceive the commercial district. Results represent in Figure 2 show that 3% of respondents find the district very good, 12% find shopping good, 30% find the district average, 33% find the district poor and 19% find the Burleigh Street Commercial District very poor. Responses for average or above average (54%) and poor or very poor (53%) are evenly dispersed. What this shows is that respondents have mixed opinions on the quality of shopping in the district.

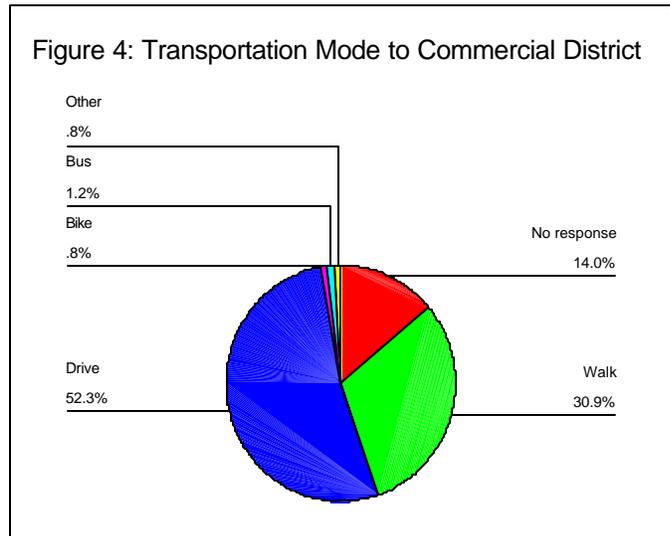


Answers for Questions 1 and 2 were cross-tabulated to find the relationship between shopping frequency and perception of the Burleigh Street Commercial District. What this graph shows is that those who shop daily, weekly, and month have a better perception of the commercial district than those who shop the district seldom or never. This can be seen by the presence of red bars (very good) above the daily, weekly, and monthly responses. Also, as the chart progresses from left to right an increase in the number of poor (magenta bars) and very poor (turquoise bars) occurs.



3. *How do you get to the businesses located within the Burleigh Street commercial district most of the time?*
Walk/Drive/Bike/Bus/Taxi/Other

Figure 4 denotes the mode of transportation the respondents most frequently use to get to the Burleigh Street Commercial District. A majority, 52% of people drive to the commercial district to shop. The remaining respondents walk (31%), take the bus (1%), or ride their bikes (1%). Less than 1% of respondents take some other form of transportation to the commercial district. Fourteen percent of respondents indicated they do not shop the district or left the category blank.



4. *How safe do you feel it is to shop at the Burleigh Street commercial district during the day and at night?*

Question 4 asked respondents how safe they felt in the Burleigh Street Commercial District at different times of day: daytime and nighttime. Figure 5 and Figure 6 are representations of respondent responses.

Figure 5 indicates that 94% of respondents find the Burleigh Street Commercial District safe during the daytime. More specifically, 34% find the district very safe and 49% find the commercial district somewhat safe. Only 12% find the district not safe during the daytime. Four percent had no opinion and a little over one percent did not answer the question.

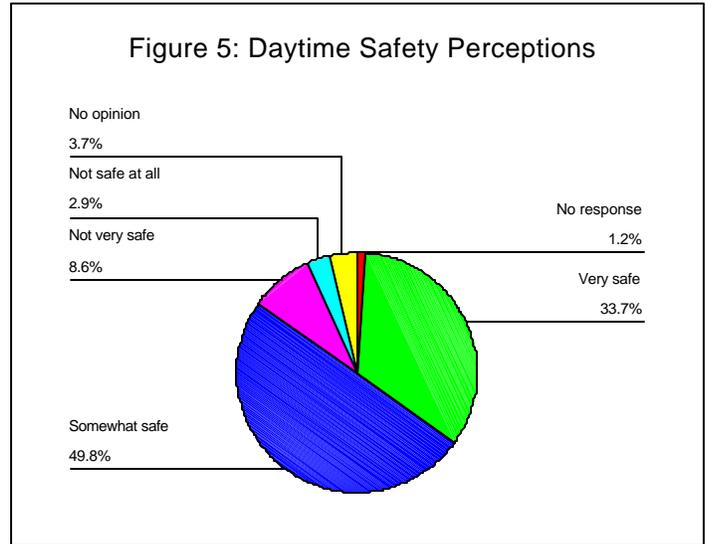
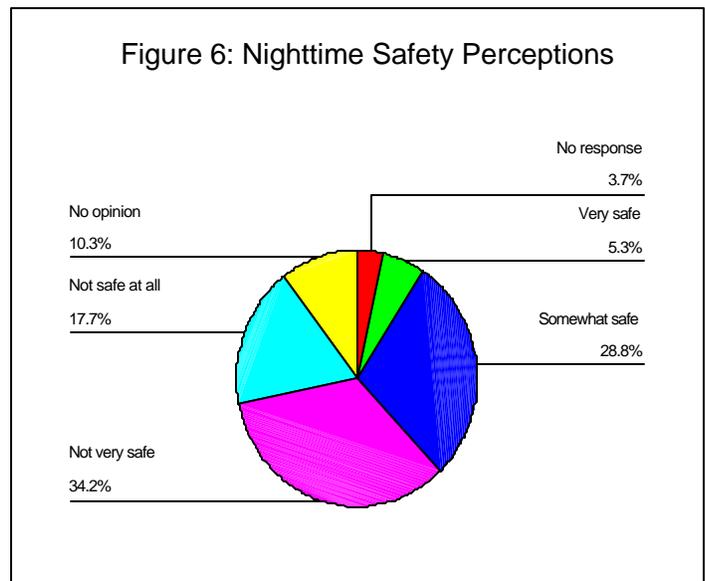


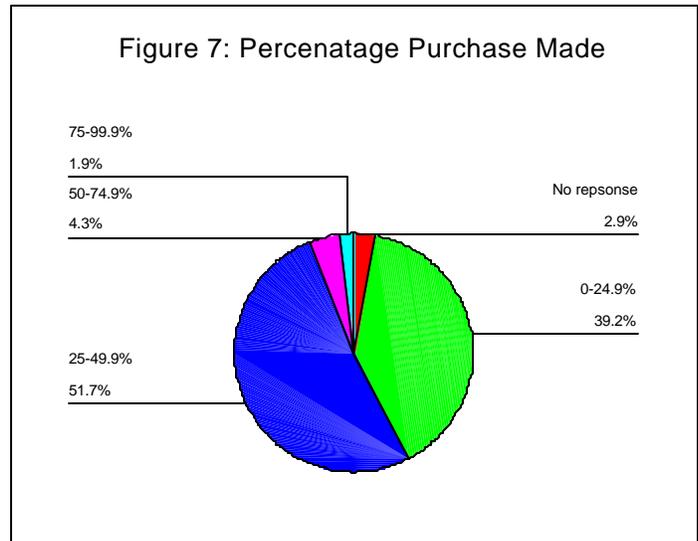
Figure 6 shows respondents answers for their perception of safety at night. A total of thirty-four percent of respondents find the commercial district safe. Meaning 5% of respondents find the district very safe, 29% of respondents feel the district is somewhat safe. Fifty-four percent of respondents find the district unsafe at night where 34% find the district not very safe, and 18% find the district not safe at all.



5. *Of your total monthly retail purchases, which number below most closely reflects the percentage of purchases that you make within the Burleigh Street commercial district? 0-24.9%/25-49.9%/50-79.9%/75-99.9%/100%*

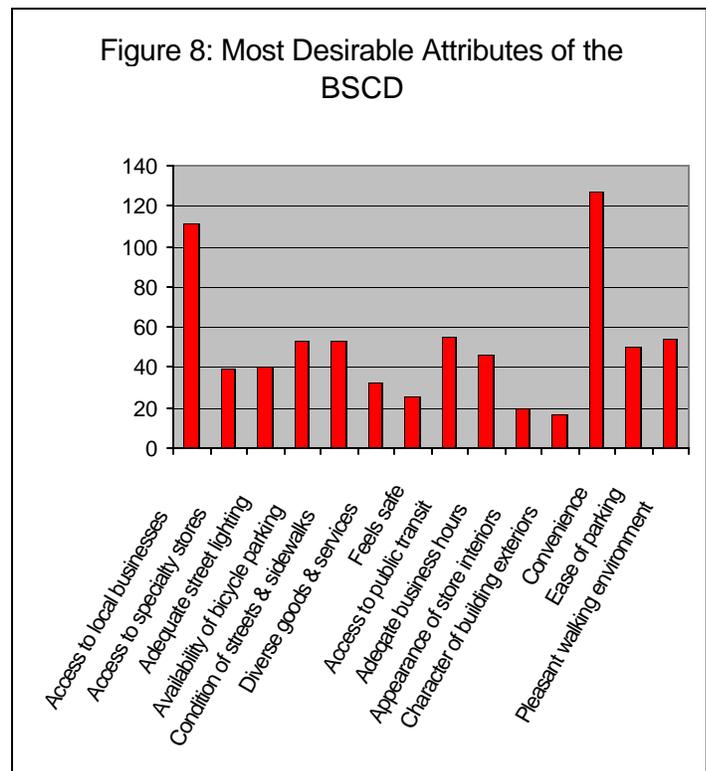
This question asks how much people shop at the commercial district. Of those who indicated they shop the commercial district in Question 1, 92% of respondents spend zero to fifty percent of their total monthly retail purchases at the commercial district. More specifically, 40% makes zero to twenty-five percent of their purchases at the commercial district and 52% makes twenty-five to fifty percent of their total monthly retail purchases in the district.

A little over four percent makes fifty to seventy-five percent of their total monthly retail purchases in the district, and two percent makes seventy-five to one hundred percent of their purchases in the district. Only 3% did not answer the question correctly or at all.



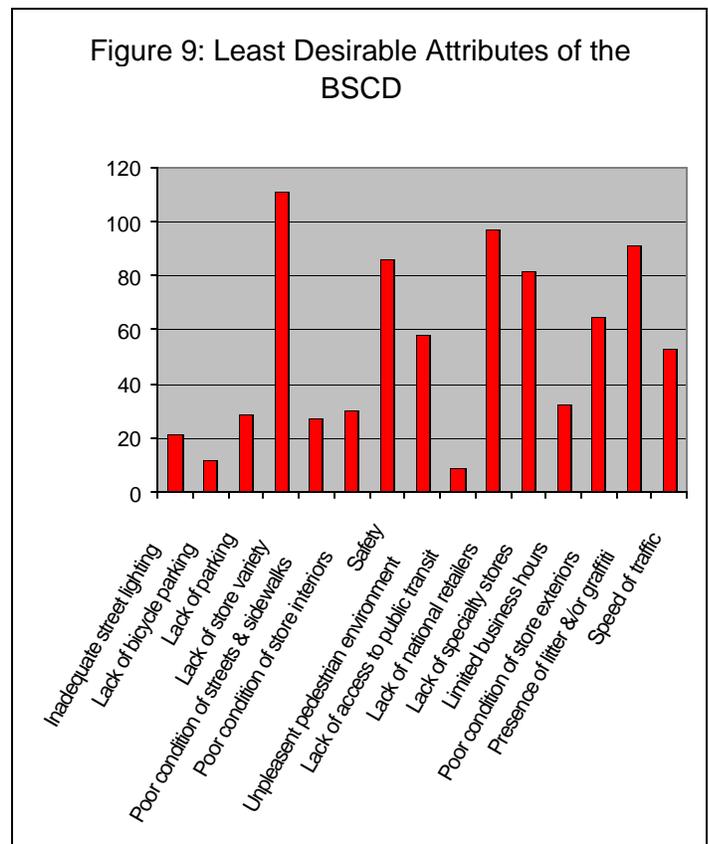
6. *What are the **TOP THREE** things you like **BEST** about the Burleigh Street commercial district?*

This question asked what people most liked about the commercial district, and is summarized in Figure 8. The two categories that received the most responses were convenience and access to the local businesses. Those that came in next with generally the same amount of responses were availability of parking, condition of streets and sidewalks, access to public transit, and pleasant walking environment. Thirdly what respondents most like about the commercial district was easy of parking and adequate business hours. Fourthly, access to specialty stores and adequate street lighting were most liked. Finally, what people liked best were the diverse goods and services, feeling of safety, appearance of store interiors, and character of building exteriors.



7. *What are the TOP THREE biggest PROBLEMS with the Burleigh Street commercial district?*

Figure 9 represents what people felt were the least desirable attributes of the Burleigh Street Commercial District. The most cited problem was lack of store variety; the next most cited problem was a lack of national retailers. In a close third were safety and the presence of litter and/or graffiti. The next most answered category was lack of specialty stores. Other more commonly referenced concerns are the poor condition of exteriors, an unpleasant pedestrian environment, and the speed of traffic. Less often listed concerns were: limited business hours, poor condition of store interiors, poor conditions of streets and/or sidewalks, inadequate street lighting; and lack of bicycle parking.



8. *Please rank the TOP THREE types of RETAIL GOODS STORES that you would like to see open within the Burleigh Street commercial district.*

Question 8 attempts to gauge what respondents most wanted in terms of retail good stores. Twenty-seven response categories for stores were given, an “other” category for unique responses, and a “none” category if the respondent felt that the commercial district contained a good mix of stores. Appendix 8 summarizes the respondents’ top three choices. These include:

- Most Common First Choice Response: Bakery
- Most Common Second Choice Response: Sit-down restaurant
- Most Common Third Choice Response: Sit-down restaurant

9. *Please rank the TOP THREE types of RETAIL SERVICES that you would like to see open within the Burleigh Street commercial district.*

This question asks respondents what retail services they would like to see open in the commercial district. Eighteen response categories were listed, an “other” category for unique responses, and a “none” category in case the respondent did not feel any additional servers were necessary. Appendix 9 contains graphs of the respondents’ top three choices. They are:

- Most Common First Choice Response: Health Club
- Most Common Second Choice Response: Copying and duplicating service
- Most Common Third Choice Response: Home repair service

Consumer Profile

10. *How long have you lived at your current address?*

This question was asked to get an understanding of how long residents have remained in the neighborhood. The results show that the population is a fairly stable, fifty-seven percent of respondents have lived in the neighborhood for over three years. A majority of respondents, 26% answered they had lived in the neighborhood 11 to 20 years. Sixteen percent said they had lived in the neighborhood for 6 to 10 years, and twelve said they had lived in the neighborhood 3 to 5 years. Only ten percent indicated they had been in the neighborhood less than two year. Twelve percent did not answer the question.

Figure 10: Tenure	
Response	Percent
Less than 1 year	3.29
1-2 years	7.00
3-5 years	11.52
6-10 years	16.05
11-20 years	26.34
Over 20 years	3.70
No response	11.52
Total	100

11. *What is your gender?*

Figure 11 shows the gender distribution of respondents. Fifty-seven percent of respondents were female and twenty-nine percent were male. This most likely not representative of the neighborhood population, but a sign that respondents are more likely to respond to a survey.

Figure 11: Gender	
Response	Percent
Female	57.20
Male	29.22
No response	13.58
Total	100

12. *What is your age range?*

Figure 12 represents the age distribution of respondents in the Burleigh Street Commercial District. The largest number of respondents was in the 35 to 54 age category, 49 percent. The next largest group to respond was the 65 to 84 year category with 16 percent. The remaining groups 20 to 34 years and 55 to 64 had 9% and 11% response rate respectively. According to the US Census Bureau figures in Appendix 4 these numbers are not representative of the neighborhood population within a mile of the Burleigh Street Commercial District. These numbers show that BSCD has a relatively young population, 32% are under the age of eighteen. Nine percent of the population is between the ages of 18 and 24; 35% are between the ages of 25 and 44; 13% are between the ages of 45 and 64; and 11% of the population is over sixty-five.

Figure 12: Age Range	
Response	Percent
0-19 Years	0.00
20-34 Years	9.47
35-54 years	48.56
55-64 years	11.52
65-84 years	16.05
Over 85 years	1.65
No response	12.76
Total	100

13. *How many adults and how many live in your household on a regular*

The next questions on the survey asked respondents what the composition of adults and children in their household was.

Figure 13 shows that a majority of households had two adults living there. Twenty-one percent of households had one person living there, thirteen percent had three or more adults living there on a regular basis, and four percent had no one over the age of 19 living there. Figure 14 shows that 28% of households had no children present; 13% had one child; 10% had two children present 8% had three or children present.

Figure 13: Adults Present	
Response	Percent
0	4.12
1	20.99
2	47.33
3 or more	13.17
No response	14.40
Total	100

Figure 14: Children Present	
Response	Percent
0	27.57
1	12.76
2	9.88
3 or more	8.23
No response	41.56
Total	100

14. *How many members of your household work full-time and/or part-time?*

Figures 16 and 17 show the percentage of people Working full - or part-time in each household. In 64% of households, there is at least one full-time worker. In 10% of household there are no full-time workers, and in 4% there are three or more full-time workers. Twenty percent of respondents did not answer for the number of full-time workers. In 24% of households there is one part-time worker; in 18% of households there are no part-time workers, in 2% of households there is two workers. In no households are there three or more part-time workers. Fifty-seven percent of respondents did not answer for the number of part-time workers.

Figure 15: Full-time Workers	
Response	Percent
0	10.29
1	34.16
2	31.28
3 or more	4.12
No response	20.16
Total	100

Figure 16: Part-time Workers	
Response	Percent
0	18.52
1	23.05
2	1.65
3 or more	0.00
No response	56.79
Total	100

15. *What is your highest level of educational attainment?*

This survey question analyzes the residents' educational levels. Figure 18 show a large number of respondents are highly educated. Nine percent have a two-year degree, 18% have completed some college, 20% have a bachelor's degree, 19% have a graduate degree, and 3% have a doctorate degree. Fifteen percent have a high school education, and 4% have less than that. Twelve percent decided not to answer the question.

Figure 17: Educational Attainment	
Response	Percent
Less than 12th grade	3.70
High school graduate	14.81
Two-year associate/technical degree	9.47
Some college	18.11
Bachelor's degree	19.75
Graduate degree	19.34
Doctorate	2.47
No response	12.35
Total	100

16. *What is your race or ethnicity?*

According to the survey results, respondents are primarily Caucasian, 52 percent. Twenty-seven percent are black or African-American. Asians, Hispanics, and Native Americans make up two percent of the population. Results are fairly representative of the neighborhood within a mile of the BSCD, according to the US Census estimates in Appendix 4. The 2000 Census found that 50% of the neighborhood was Caucasian, 46% was black or African-American, 0.4% were Native American, 1% were Asian, and 2.1% were Hispanic.

Figure 18: Race/Ethnicity	
Response	Percent
Native Americans	0.41
Black or African American	27.98
Caucasian	52.26
Asian or Pacific Islander	0.41
Hispanic or Latino	0.82
Other	2.47
No response	15.64
Total	100

17. *What is your total annual gross household income range?*

Question 17 asked respondents to indicate their annual gross income range. As shown in Figure 20, 55% of respondents make \$35,000 or more in a year. Eight percent indicated their household income was between twenty-five and thirty-vie thousand dollars a year, 7% responded that their household in come was between fifteen and twenty-four thousand dollars per year, and 4% indicated there income was less than fifteen thousand. Twenty-six percent of respondents chose not to respond. When compared to the 1996 Claritas estimate of \$36,522, these figures appear relatively high, and indicate that those with greater education responded to the survey more frequently than those with less education.

Figure 19: Household Income	
Response	Percent
\$0-14,999	3.70
\$15-24,999	6.58
\$25-34,999	8.23
\$35-49,999	18.11
\$50-74,999	21.40
\$75,000 or more	15.64
No response	26.34
Total	100

Survey Conclusions

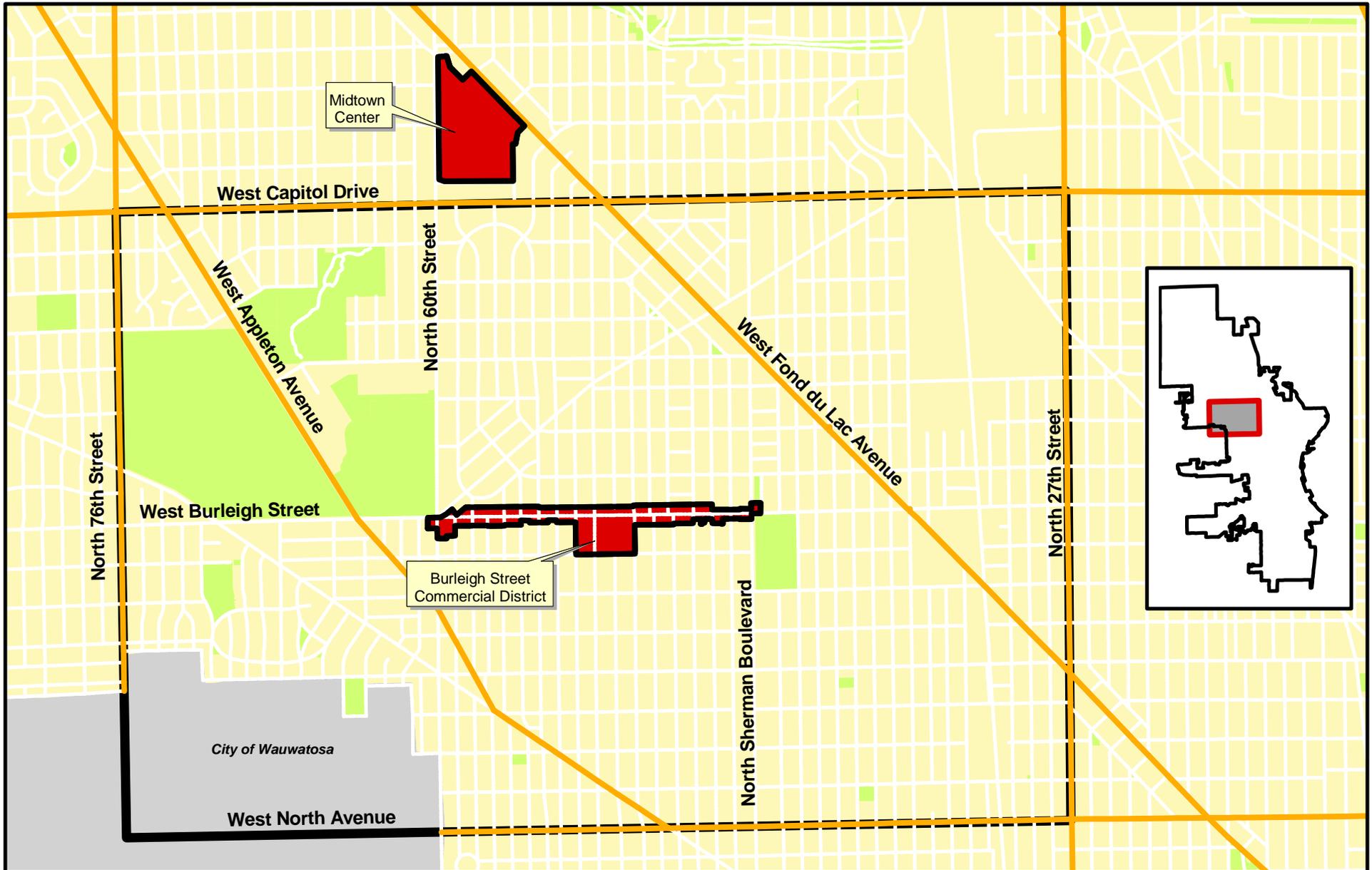
The outcomes of the survey are useful to determine the health of the Burleigh Street Commercial District and the types of improvements that should be made. The results have demonstrated that the retail stores are highly utilized by local residents. A total of 51% of the respondents indicated that they shop in the commercial district regularly. Despite this information, residents have mixed feelings about how they perceive the quality of shopping in the commercial district. Responses for average or above average perceptions were 54 percent and responses for poor or very poor perceptions were 53 percent.

The mixed perceptions of the commercial district are most likely a result of the needed improvements that were identified by the survey respondents. The most cited problem was lack of store variety. Respondents also felt that there was a lack of national retailer prescreens within the Burleigh Street Commercial District. Thirdly respondents cited presence of litter and/or graffiti and safety within the BSCD as a detraction. The concern with safety especially at night is corroborated with 52 percent of respondents finding the district safe or not safe at all after dark. Even though respondents found several negativities within the district, there was a positive connotation from respondents as well. What respondents liked the most about the Burleigh Street Commercial District was convenience and access to the local businesses.

What they would like to see more of in regards to retail goods and services fit several of the findings of the market analysis. The market analysis found that there was a large gap for full-service restaurants. In two of the three most common responses sit-down restaurants were stated as lacking in the BSCD. A category that was not included in the market analysis that respondents asked for was bakeries this is the most commonly asked for retail service. Additionally, respondents asked for the following retail services that are not tracked by the *Consumer Expenditure Survey* and could not be analyzed in the market analysis. Respondents' first choice response was a health club. Secondly, respondents asked for a copying and duplicating service and lastly respondents asked for was a home repair service.

It is encouraging that the survey results overlap with the findings of the market analysis. However, it should be noted that the survey respondents do not accurately represent the racial and ethnic diversity of the study area. Caution should be taken in interpreting the results of this survey. Future steps to further determine market opening could be held. Other successful strategies to implement are focus groups, telephone surveys, or face-to-face interviews with residents in the neighborhood.

Appendix 1



Burleigh Street (60th St to Sherman Blvd) Neighborhood Commercial District

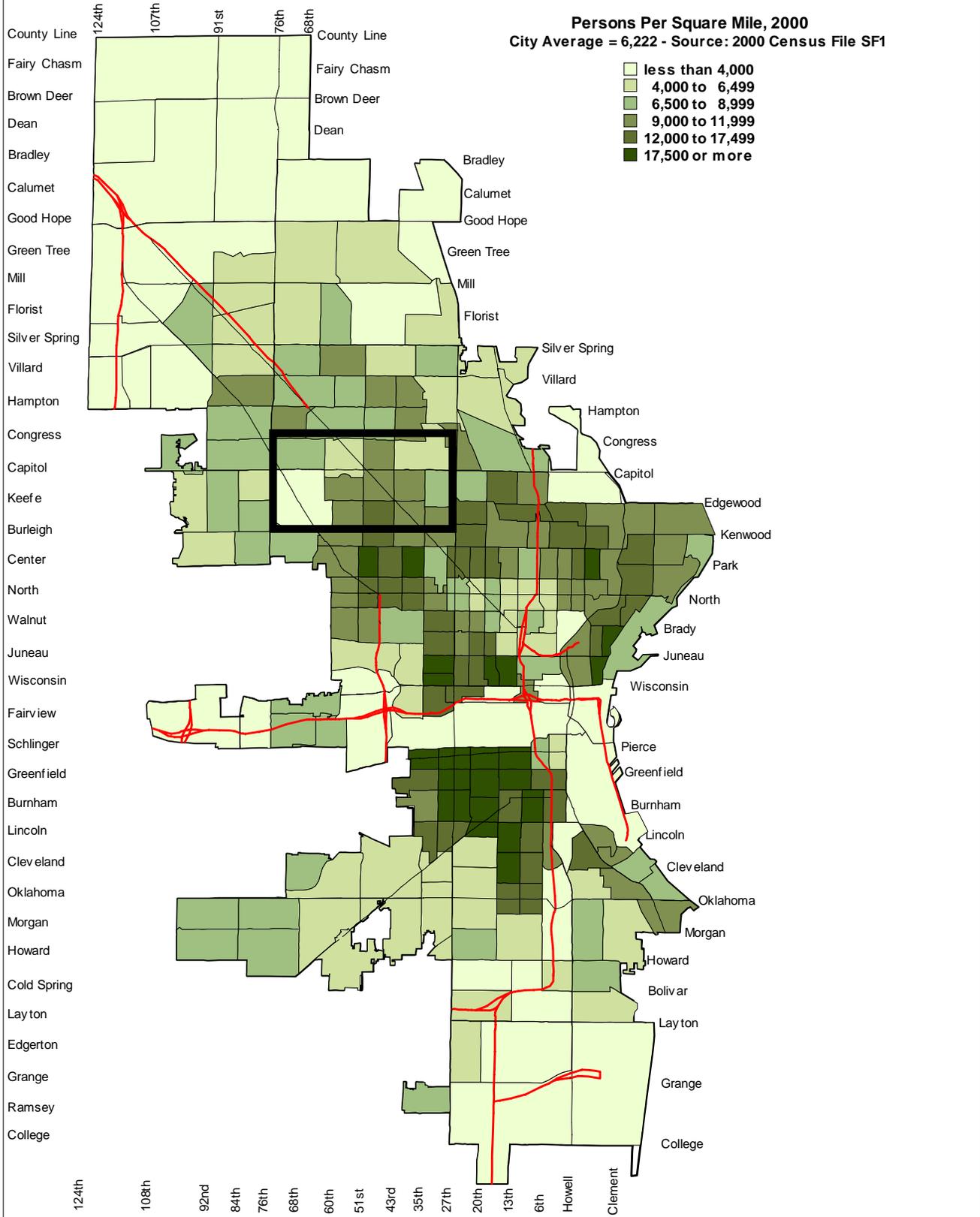
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 Milwaukee Mainstreets Program
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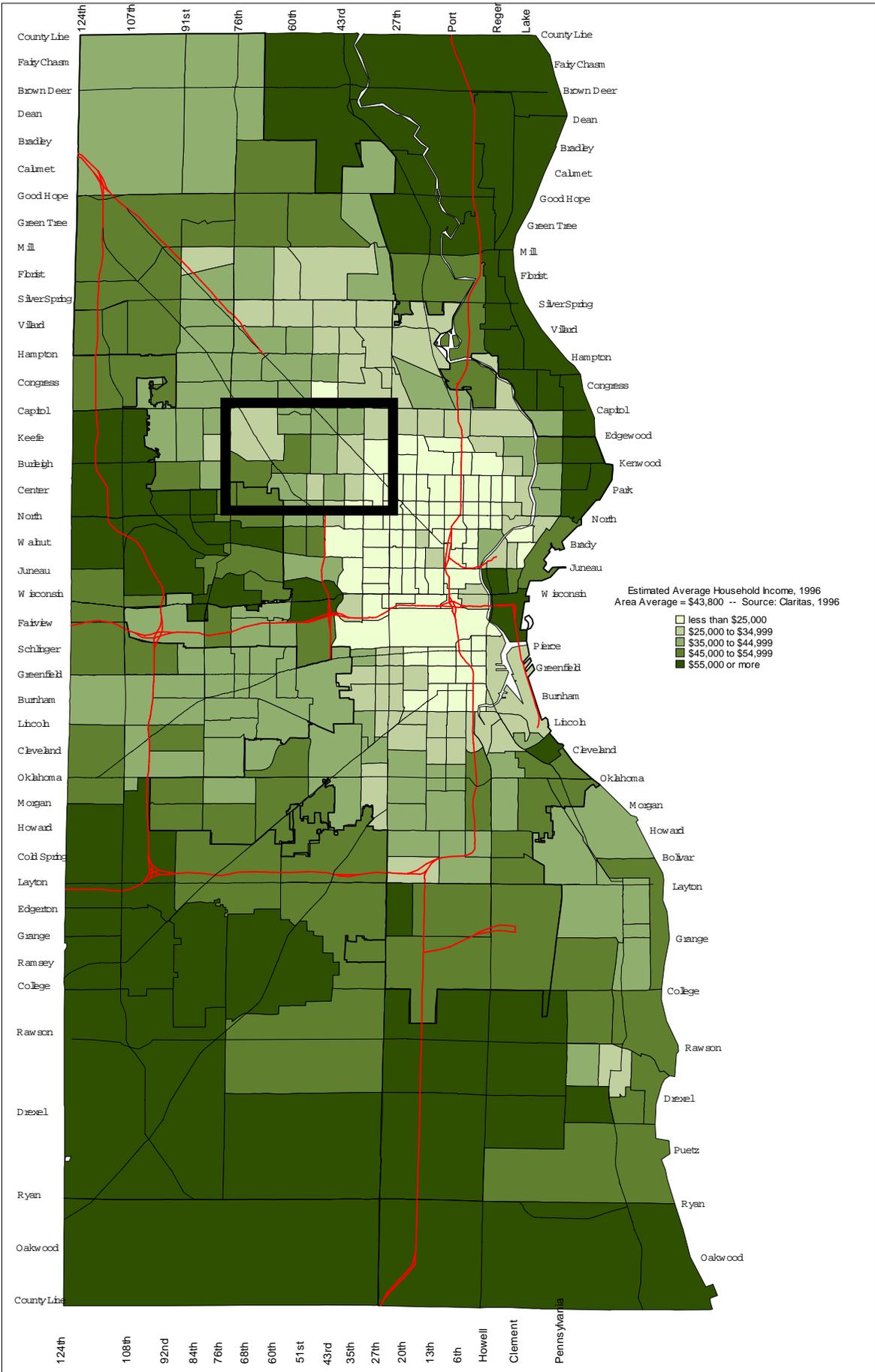


Appendix 2

Persons Per Square Mile, 2000
 City Average = 6,222 - Source: 2000 Census File SF1



Appendix 3



Appendix 4

Demographics

Characteristic	1-Mile Radius of Burleigh St Commercial District 1990 Census		1-Mile Radius of Burleigh St Commercial District 2000 Census*		City of Milwaukee 1990 Census		Metropolitan Area 1990 Census	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total Population	60,422	100.0%	53,983	100.0%	628,088	100.0%	1,432,149	100.0%
Race and Ethnicity								
White	30,455	50.4%	13,324	24.7%	381,714	60.8%	1,158,995	80.9%
Black	27,673	45.8%	37,587	69.6%	189,408	30.2%	195,247	13.6%
American Indian	248	0.4%	215	0.4%	5,213	0.8%	7,237	0.5%
Asian	589	1.0%	969	1.8%	11,429	1.8%	18,302	1.3%
Hispanic	1,295	2.1%	1,488	2.8%	39,409	6.3%	51,306	3.6%
Age								
Under 5 Years	5,907	9.8%	4,826	8.9%	54,276	8.6%	109,737	7.7%
5 to 17 Years	13,158	21.8%	14,279	26.5%	117,864	18.8%	266,403	18.6%
18 to 24 Years	5,607	9.3%	5,004	9.3%	76,592	12.2%	144,747	10.1%
25 to 44 Years	21,618	35.8%	16,321	30.2%	203,479	32.4%	469,246	32.8%
45 to 64 Years	7,668	12.7%	9,745	18.1%	97,732	15.6%	263,501	18.4%
65 Years or Older	6,484	10.7%	3,808	7.1%	78,145	12.4%	178,515	12.5%
Educational Background								
Persons 25 Years or Older	32,492	100.0%	N/A	N/A	380,545	100.0%	913,016	100.0%
At Least High School Graduate	18,743	57.7%	N/A	N/A	272,076	71.5%	697,272	76.4%
College Graduate	5,994	18.4%	N/A	N/A	56,440	14.8%	194,383	21.3%
Occupation								
Total Workers	24,244	100.0%	N/A	N/A	274,237	100.0%	700,737	100.0%
Executive, Professional	5,704	23.5%	N/A	N/A	58,438	21.3%	186,592	26.6%
Technical	917	3.8%	N/A	N/A	9,474	3.5%	25,521	3.6%
Sales	2,694	11.1%	N/A	N/A	28,357	10.3%	83,865	12.0%
Clerical	4,718	19.5%	N/A	N/A	51,543	18.8%	122,624	17.5%
Service	3,598	14.8%	N/A	N/A	46,645	17.0%	93,536	13.3%
Skilled	2,204	9.1%	N/A	N/A	27,852	10.2%	78,393	11.2%
Unskilled	4,341	17.9%	N/A	N/A	51,928	18.9%	110,206	15.7%
Total Households								
Total Households	22,669	100.0%	19,528	100.0%	240,540	100.0%	537,722	100.0%
With Female Heads	10,002	44.1%	9,951	51.0%	98,106	40.8%	165,181	30.7%
With Children	9,272	40.9%	7,623	39.0%	82,004	34.1%	189,303	35.2%
With One Parent	4,557	20.1%	4,648	23.8%	39,104	47.7%	55,082	29.1%
Average Household Size	3.29	N/A	2.85	N/A	2.53	N/A	2.60	N/A
Median Household Income								
Median Household Income	\$ 22,798		N/A	N/A	\$ 23,627		\$ 32,316	
Average Household Income								
Average Household Income	\$ 28,331		N/A	N/A	\$ 28,415		\$ 38,958	
Aggregate Income								
Aggregate Income	\$ 642,235,439		N/A	N/A	\$ 6,834,944,100		\$ 20,948,573,676	
Aggregate Income Per Sq Mile								
Aggregate Income Per Sq Mile	\$ 22,725,953		N/A	N/A	\$ 241,859,310		\$ 741,280,031	
Estimated Average Income - 1996								
Estimated Average Income - 1996	\$ 32,442		N/A	N/A	\$ 35,285		\$ 29,418	
Estimated Aggregate Income - 1996								
Estimated Aggregate Income - 1996	\$ 735,419,850		N/A	N/A	\$ 8,487,450,900		\$ 15,818,923,750	
Estimated Aggregate Income Per Sq Mile - 1996								
Estimated Aggregate Income Per Sq Mile - 1996	\$ 26,023,349		N/A	N/A	\$ 300,334,427		\$ 559,763,756	
Estimated Aggregate Income - 2001								
Estimated Aggregate Income - 2001	\$ 830,101,054		N/A	N/A	N/A		N/A	
Persons Below Poverty								
Persons Below Poverty	12,088	20.0%	N/A	N/A	135,583	21.6%	179,650	12.5%
Total Housing Units								
Total Housing Units	23,877	100.0%	20,973	100.0%	254,204	100.0%	562,031	100.0%
Owner Occupied	11,312	47.4%	9,579	40.1%	107,682	42.4%	319,659	56.9%

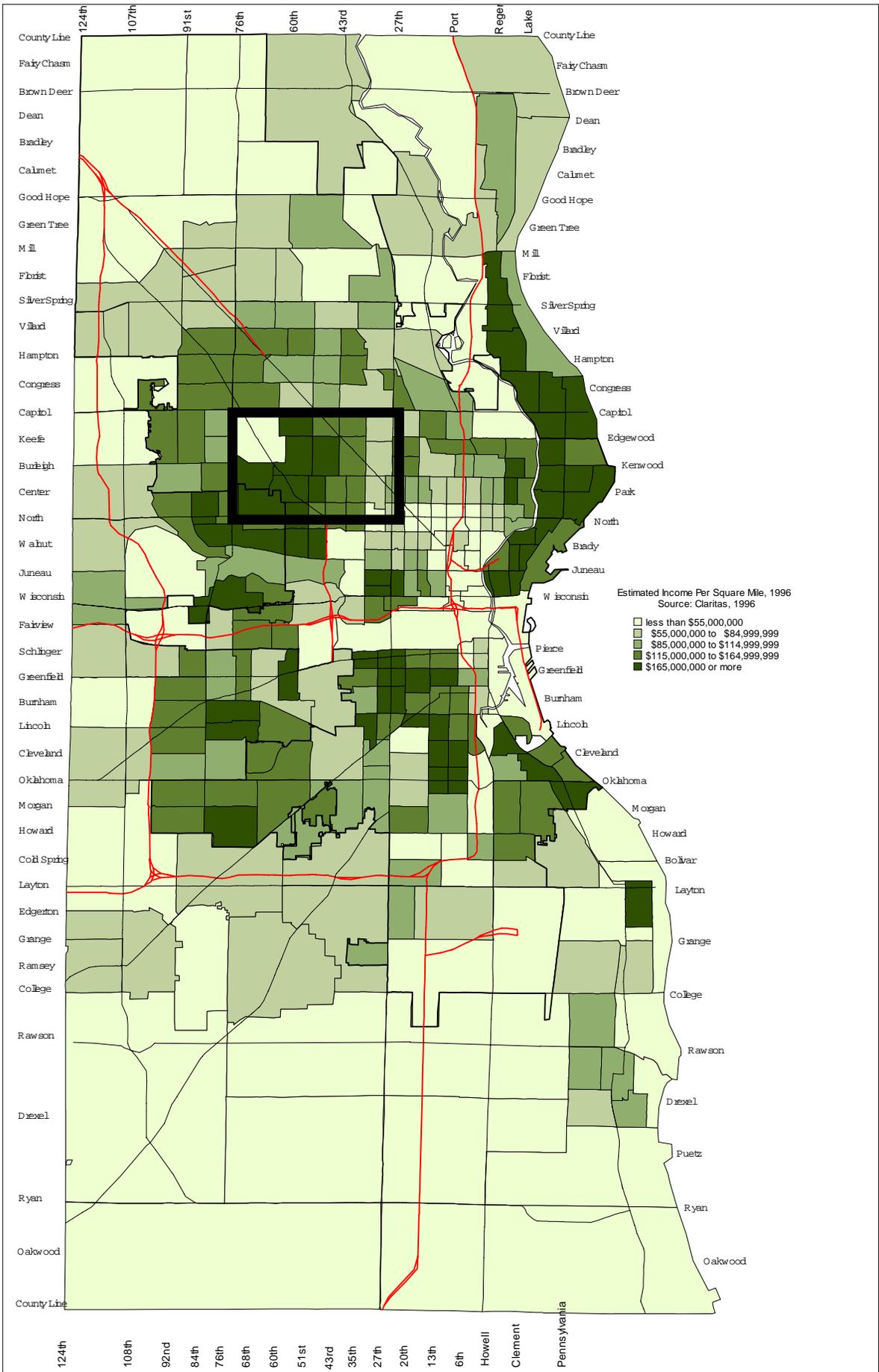
Source:

US Bureau of the Census

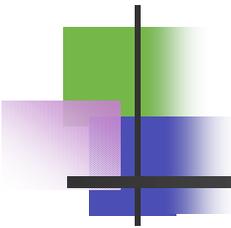
Claritas for 1996 Income Estimate

*Occupation, Income, and Educational Background data will not be available until September 2002 or later.

Appendix 5

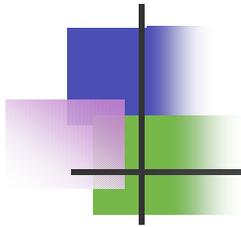


Appendix 6

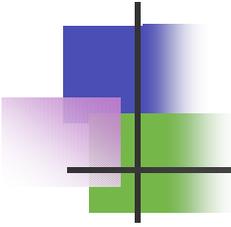


Purchasing Power Profile: 53rd and Burleigh

Milwaukee, Wisconsin



Prepared by the University of Wisconsin-Milwaukee Employment and Training Institute for the Milwaukee Department of City Development, with funding from the Helen Bader Foundation.



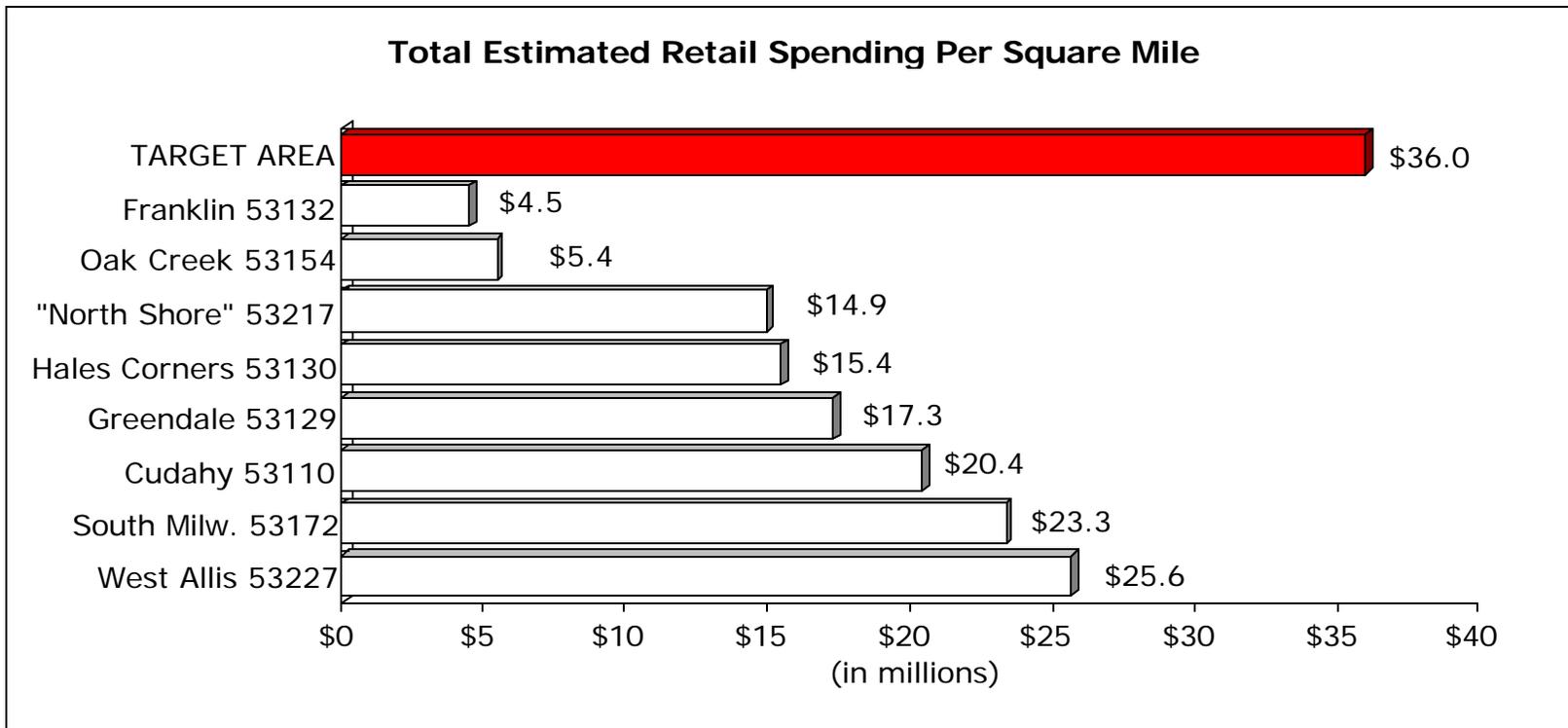
Spending Power Per Square Mile

- Much of the income earned in the N. 53rd Street and Burleigh Street Target Area converts to direct spending power. Based on residents' 1999 income tax returns and data on elderly persons, it is estimated that residents within a 3-mile radius spend \$946.1 million annually on retail expenditures.

Estimated 1999 Consumer Expenditures	Total Within 3-Mile Radius	Expenditures Per Square Mile
Food at home	\$343,431,044	\$13,068,152
Food away from home	\$127,427,473	\$4,848,838
Apparel and services	\$155,705,930	\$5,924,883
Entertainment	\$166,210,754	\$6,324,610
Household furnishings and equipment	\$117,923,357	\$4,487,190
Personal care products and services	\$35,431,811	\$1,348,242
TOTAL RETAIL	\$946,130,369	\$36,001,917

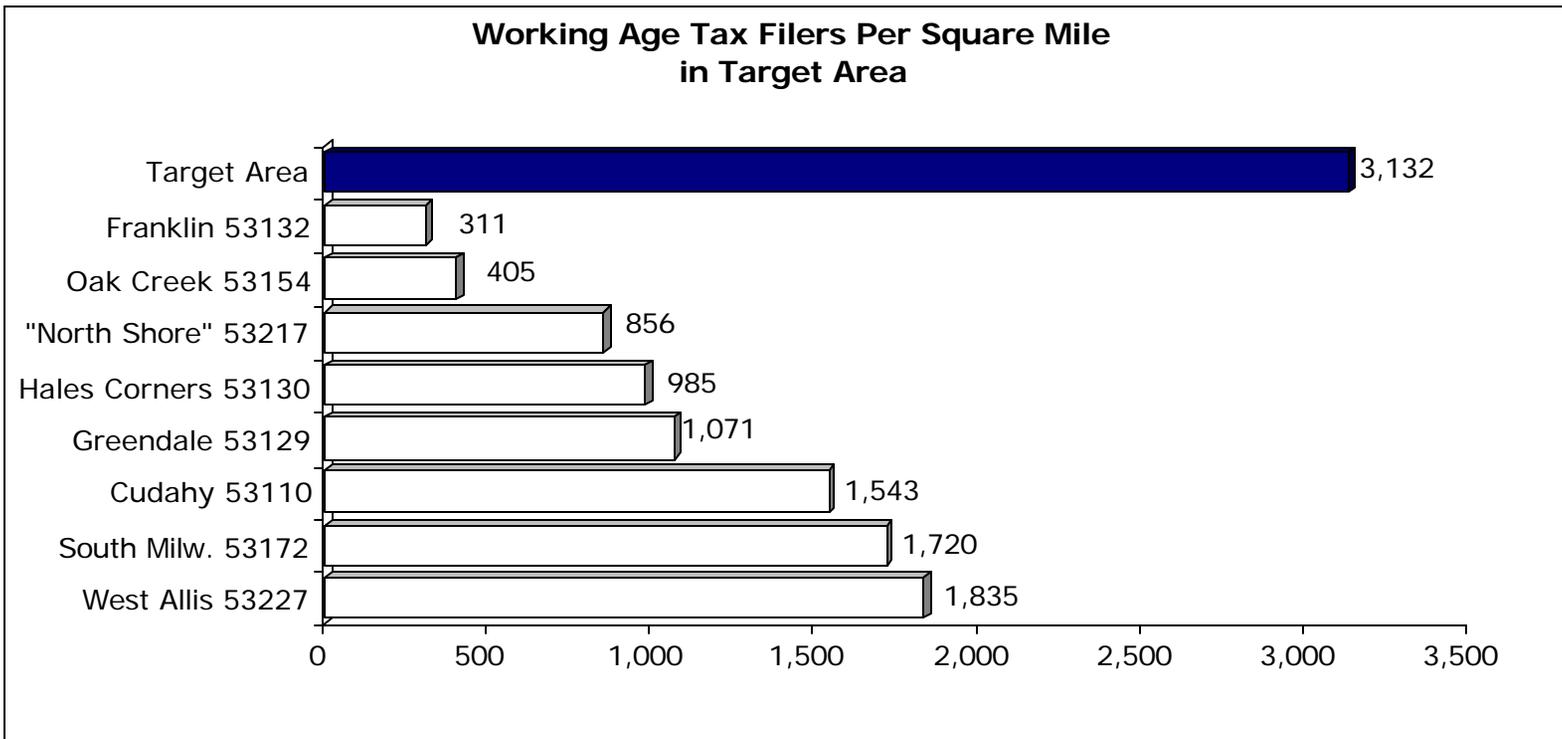
Retail Spending

- Residents in the 53rd and Burleigh Target Area spend an average of \$36 million per square mile on retail items.



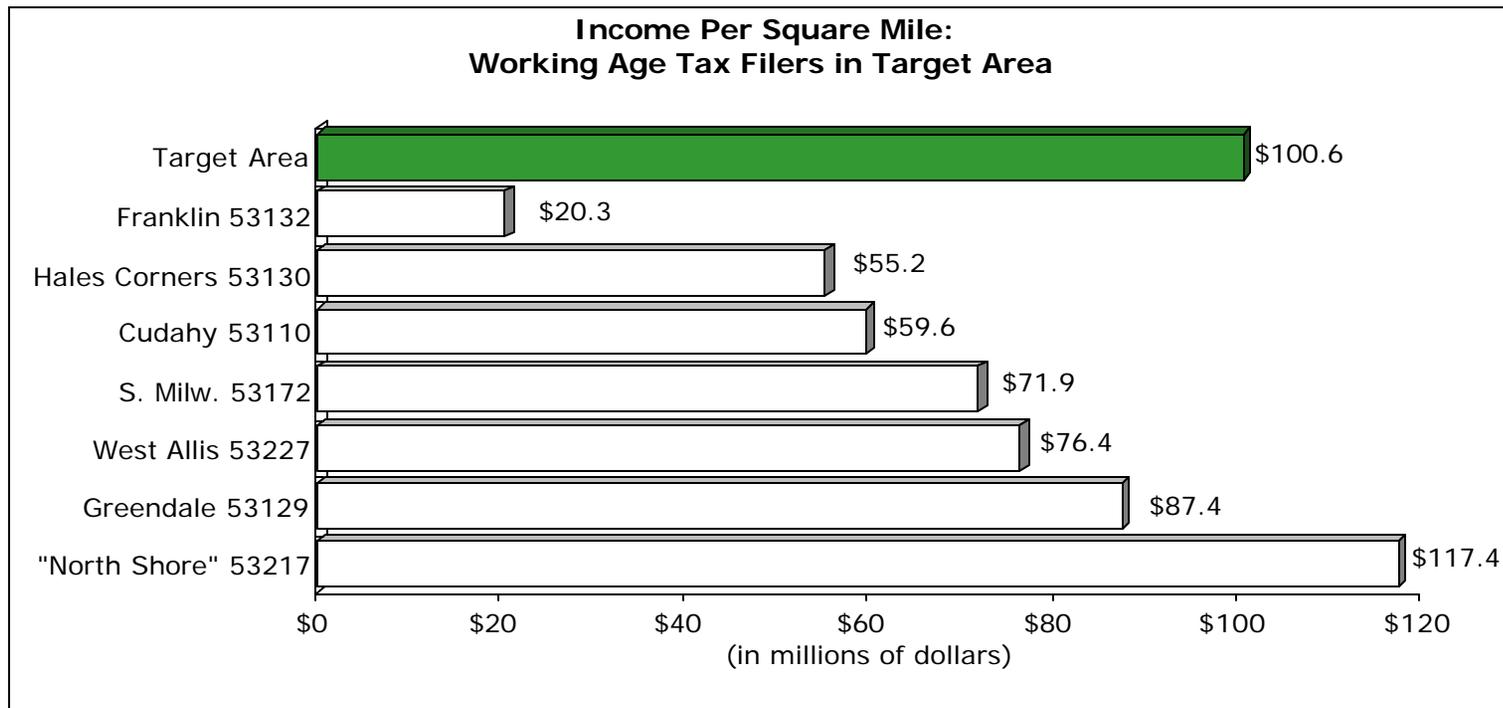
Workforce Density

- The target area has 82,310 working age tax filers. These include 26,798 one-parent filers with dependents, 13,102 married filers with dependents, 8,655 married filers with no dependents and 33,755 single person filers.
- This area has more working age income tax filers per square mile than Milwaukee's "North Shore" and many suburban areas.



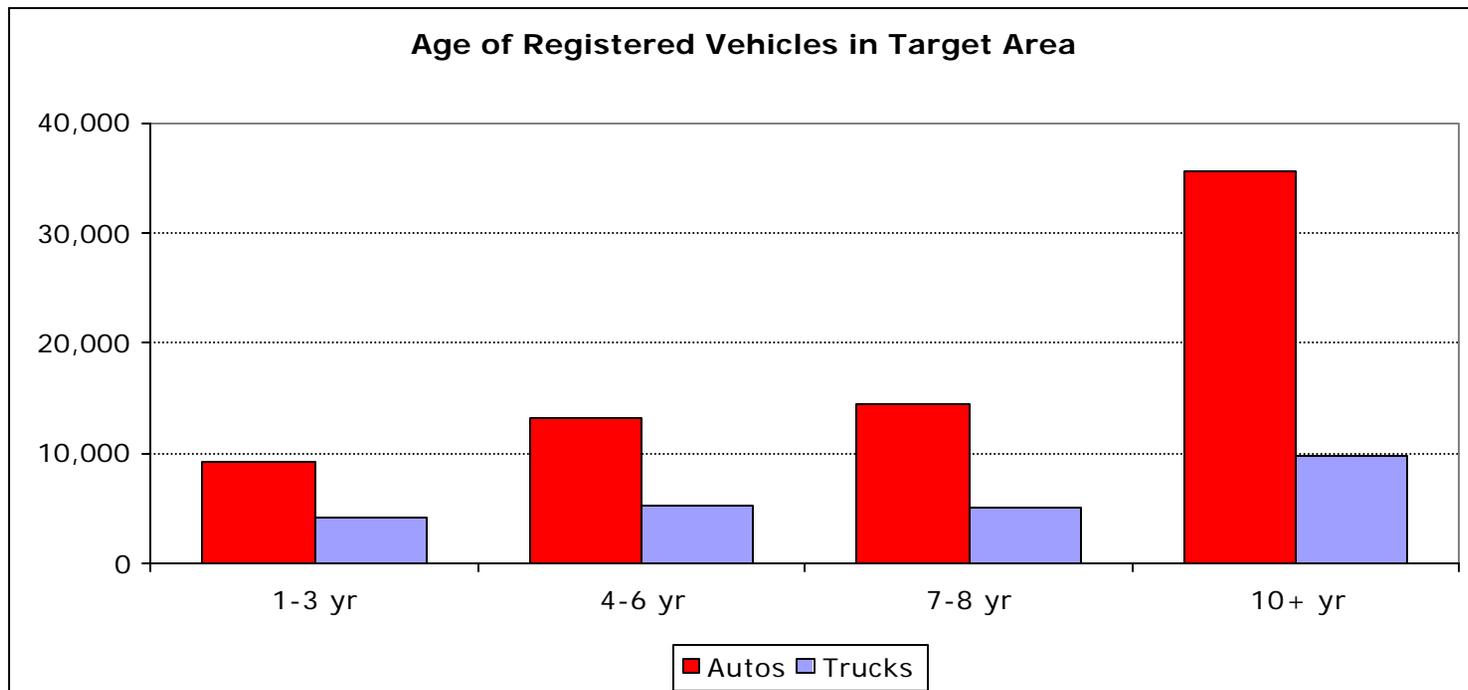
Income Per Square Mile

- Working age families and single persons living within a 3-mile radius of 53rd and Burleigh reported \$2.6 billion in total adjusted gross income in 1999.
- The annual income of working age tax filers in the target area (\$100.6 million per square mile) outpaces that of many suburban areas.



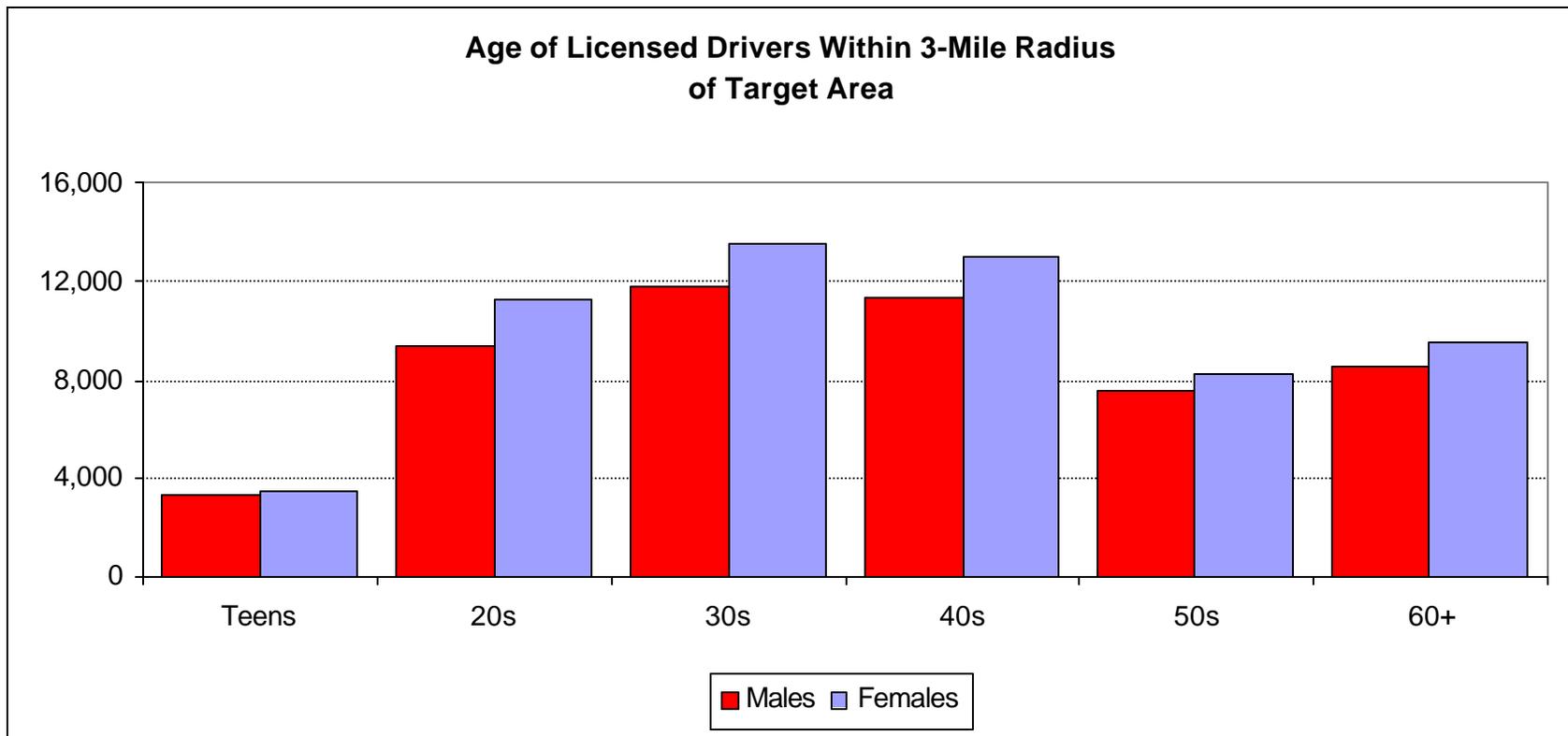
Vehicle Ownership

- Registered vehicles in the target area total 96,785. The area has 3,683 vehicles per square mile.
- The most popular car brands are Chevrolet, Buick, Ford and Oldsmobile. The most popular truck brands are Chevrolet, Ford, Dodge and Plymouth.
- 13% of cars and 17% of trucks are 1-3 years old. Half of the cars are 10 or more years old.



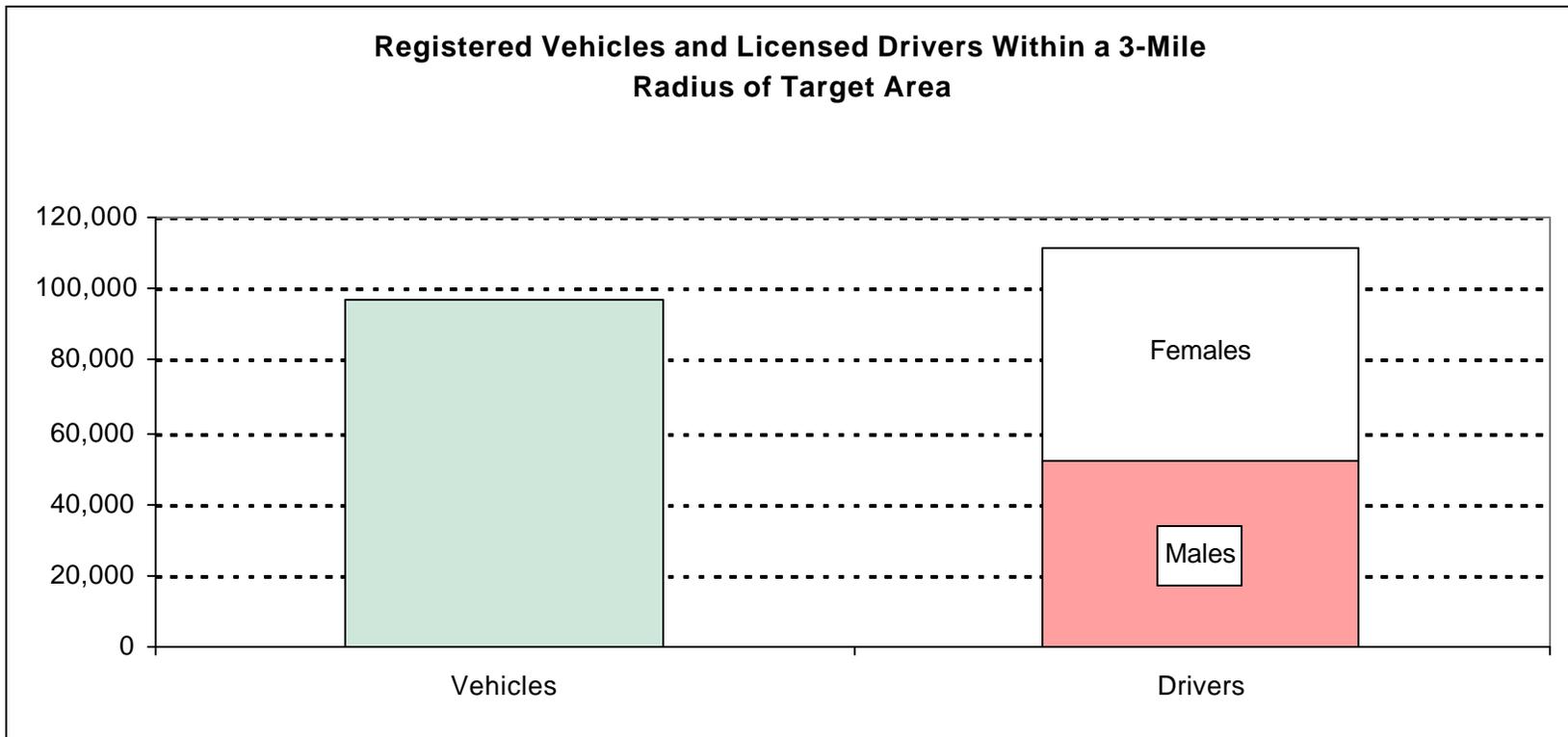
Licensed Drivers

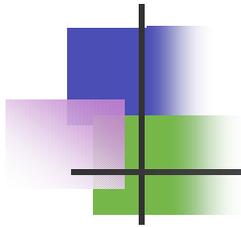
- The target area has 111,204 licensed drivers: 52,007 males and 59,197 females.
- 45% of drivers are in their thirties and forties.



Ratio of Drivers to Vehicles

- Records show a 1.1:1 ratio of licensed drivers (111,204) to vehicles (96,785).





Data Sources: Analysis of data from the Wisconsin Department of Revenue, Wisconsin Department of Transportation, U.S. Census Bureau, Consumer Expenditure Survey, Health Care Finance Administration, U.S. Postal Service, Home Mortgage Disclosure Act, and City of Milwaukee property files. Prepared by the University of Wisconsin-Milwaukee Employment and Training Institute for the City of Milwaukee Department of City Development and the Helen Bader Foundation, July 2001. For more information, contact the Employment and Training Institute, 414-227-3385, email eti@uwm.edu.

Appendix 7

Gap in Retail Sales - Burleigh Street (60th to Sherman Blvd) Commercial District

Product	Total Receipts	# Stores	Output per Store 1997 \$	Adjusted Output per Store 2001 \$	# Local Trade Area Shops	Estimated Total Local Output	Local Demand	Estimated Gap	# Additional Stores to Reach Capacity
Apparel and Services									
Men's Clothing Stores	\$41,441,000	58	\$714,500	\$788,398	5	\$3,941,992	\$7,556,168	\$3,614,176	4.58
Women's Clothing Stores	\$117,477,000	180	\$652,650	\$720,151	9	\$6,481,363	\$11,137,290	\$4,655,927	6.47
Children's and Infant Clothing Stores	\$14,927,000	20	\$746,350	\$823,543	2	\$1,647,085	\$6,202,504	\$4,555,419	5.53
Shoe Stores	\$120,278,000	168	\$715,940	\$789,988	6	\$4,739,927	\$6,016,285	\$1,276,358	1.62
Jewelry Stores	\$118,762,000	166	\$715,434	\$789,429	9	\$7,104,859	\$4,834,515	(\$2,270,344)	(2.88)
Dry-Cleaning and Laundry Services	\$40,522,000	134	\$302,403	\$333,680	4	\$1,334,718	\$4,834,515	\$3,499,797	10.49
Sewing, Needle, and Piece Good Stores	\$22,080,000	38	\$581,053	\$641,149	1	\$641,149	\$4,834,515	\$4,193,366	6.54
Entertainment									
Appliances, Televisions, & Other Electronics Stores	\$373,987,000	149	\$2,509,980	\$2,769,579	9	\$24,926,211	\$11,266,649	(\$13,659,562)	(4.93)
Book Stores	\$101,484,000	111	\$914,270	\$1,008,830	3	\$3,026,491	\$3,596,508	\$570,017	0.57
Computers and Software Stores	\$112,389,000	61	\$1,842,443	\$2,033,001	3	\$6,099,002	\$13,149,719	\$7,050,718	3.47
Florists	\$32,380,000	123	\$263,252	\$290,479	2	\$580,959	\$13,149,719	\$12,568,761	43.27
Gift Stores	\$68,884,000	181	\$380,575	\$419,936	5	\$2,099,681	\$6,522,797	\$4,423,116	10.53
Hobby, Games, & Toys Stores	\$80,830,000	74	\$1,092,297	\$1,205,270	2	\$2,410,540	\$6,522,797	\$4,112,257	3.41
Tape, CD, & Record Stores	\$38,437,000	46	\$835,587	\$922,009	6	\$5,532,054	\$9,784,195	\$4,252,141	4.61
Video Tape Rental Stores	\$44,137,000	101	\$437,000	\$482,198	1	\$482,198	\$9,450,643	\$8,968,446	18.60
Food At Home									
Supermarkets	\$2,230,656,000	328	\$6,800,780	\$7,504,163	4	\$30,016,654	\$49,833,066	\$19,816,412	2.64
Speciality Food Stores	\$55,260,000	131	\$421,832	\$465,461	23	\$10,705,598	\$1,201,426	(\$9,504,172)	(20.42)
Convenience Stores	\$52,306,000	79	\$662,101	\$730,580	8	\$5,844,642	\$1,201,426	(\$4,643,216)	(6.36)
Food Away from Home									
Full Service Restaurant	\$567,431,000	915	\$620,143	\$684,283	14	\$9,579,956	\$18,193,043	\$8,613,087	12.59
Limited Service Restaurants	\$505,179,000	853	\$592,238	\$653,491	25	\$16,337,281	\$9,369,417	(\$6,967,864)	(10.66)
Health and Personal Care Items									
Pharmacies and Drug Stores	\$681,664,000	214	\$3,185,346	\$3,514,796	7	\$24,603,571	\$25,894,245	\$1,290,673	0.37
Cosmetics, Beauty Supplies, and Perfume Stores	\$21,174,000	35	\$604,971	\$667,542	6	\$4,005,250	\$805,002	(\$3,200,248)	(4.79)
Health Food Supplement Stores	\$21,277,000	37	\$575,054	\$634,530	5	\$3,172,650	\$805,002	(\$2,367,648)	(3.73)
Hair, Nail, and Skin Services	\$92,937,000	573	\$162,194	\$178,969	63	\$11,275,040	\$4,226,263	(\$7,048,778)	(39.39)
Household Furnishings and Equipment									
Furniture Stores	\$293,428,000	136	\$2,157,559	\$2,380,708	6	\$14,284,249	\$6,707,536	(\$7,576,713)	(3.18)

= Total Receipts
/ # of Stores

= Adjusted Output
per Store *
Area Shops

= Local
Demand
- Total Output

= Gap /
Adjusted
Output

US Bureau of Census, 1990 and 2000 Census

Business USA 2001

Consumer Expenditure Survey 1999-2000

Consumer Price Index

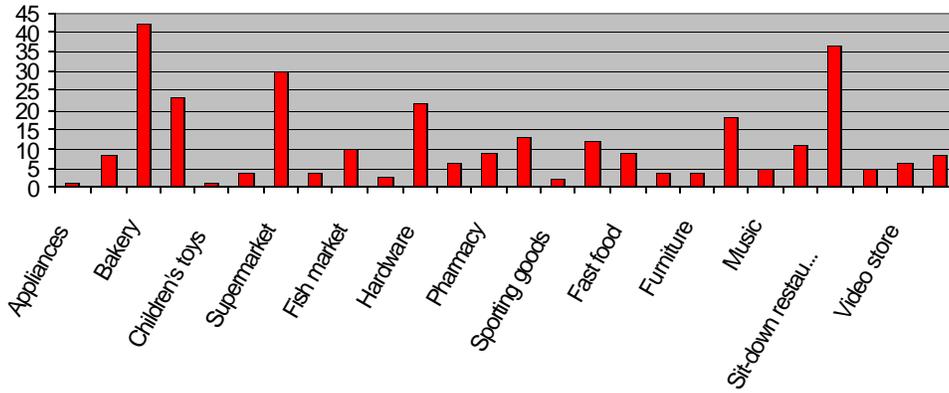
US Bureau of Census, Census of Retail Trade 1997, Milwaukee-Waukesha, PMSA

*Assumes No Growth in the # of Households

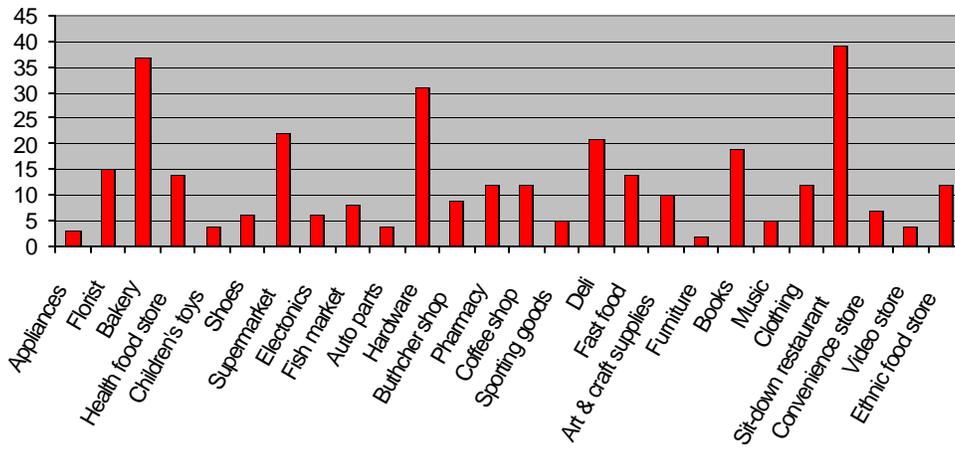
**Higher level data, PMSA data was not disclosed in the Economic Census

Appendix 8

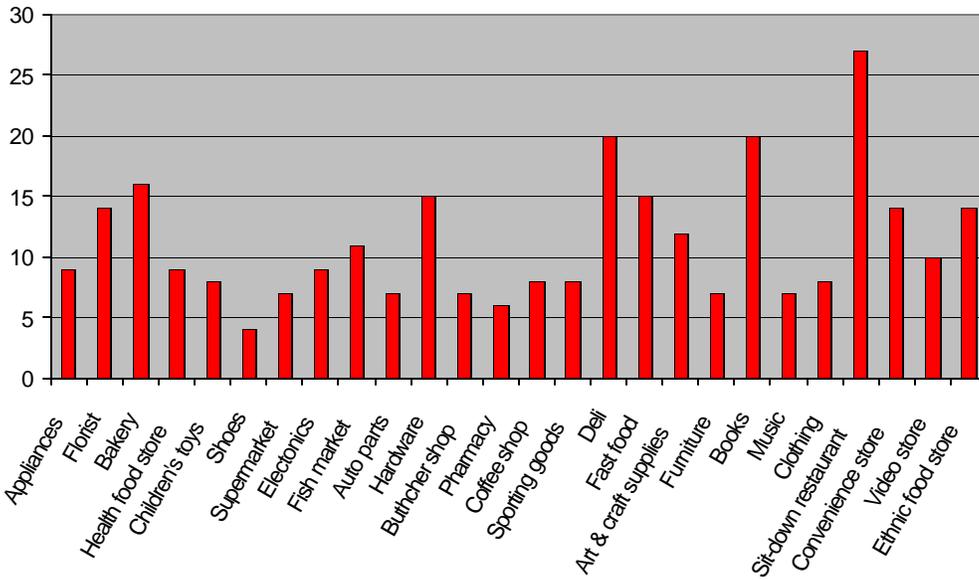
Desired Retail Goods Stores First Choice Responses



Desired Retail Good Stores Second Choice Responses

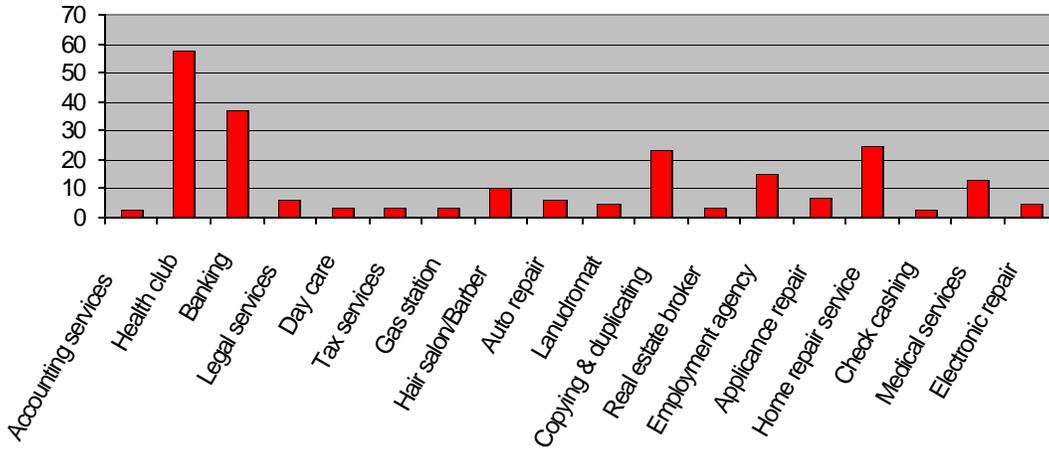


Desired Retail Goods Stores Third Choice Responses

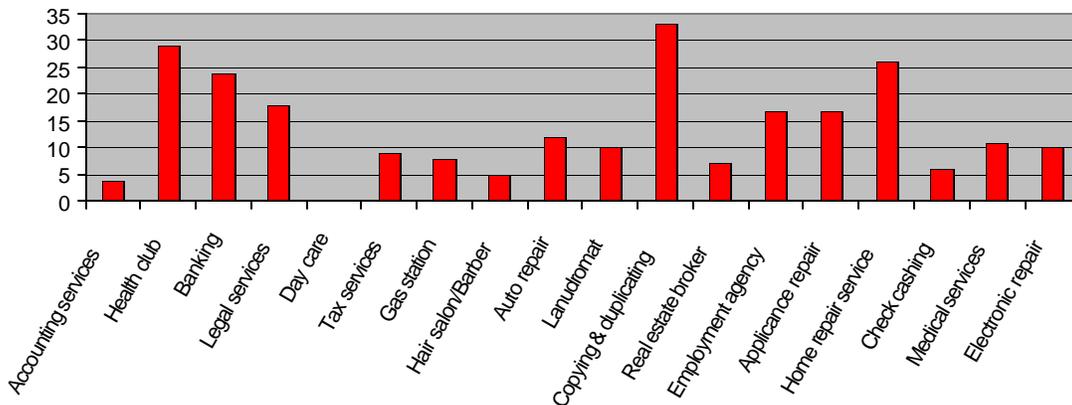


Appendix 9

Desired Retail Services First Choice Responses



Desired Retail Services Second Choice Responses



Desired Retail Services Third Choice Responses

